Hyperion Planning
User Manual

Dartmouth College
December, 2012

Table of Contents

Overview 3
Set-up instructions 5
Signing in 6
Forms 8
CentBudg Forms 8
DeptBudg Forms 12
Hyperion Planning Functionality 17
Color codes 17
Toolbar Commands 17
Working with Forms in Hyperion Planning 21
Entering Data within Forms 21
Saving Data and Running the Business Rule 22
Viewing a Different Entity or Org 24
Adding Supporting Detail 24
Budgeting to a Chart String Not in the Forms 26
Best Practices 31
Working with Forms in Hyperion Smart View 32
Smart View Initial Set-Up 32
Smart View and Microsoft Office Suite 36
Establishing a Connection 39
Selecting a Form 42
Viewing a Different Entity or Org 44
Entering Data and Navigating within Smart View Forms 45
Saving Data and Running Business Rules 45
Adding Cell Text 46
Adding Supporting Detail 46
Option Settings 50
Delegating Responsibility to Others 53

Overview

Hyperion Planning is the centralized, Excel and web-based application Dartmouth College uses for budgeting and planning.

There are two stages to the budget process; the first stage is the creation of a high-level central budget (CentBudg) and the second stage is the creation of detailed department budgets (DeptBudg).

CentBudg

The central budget provides the Board of Trustees with an early view of budget data. The board looks at high-level targets (by organizational area) that reflect divisional and institutional priorities. This higher-level view asks you to budget at specific parent levels, rather than at child levels.

For example, rather than specifying individual components of travel expenses by specific funding sources and for specific activities, you budget a value for an Org's domestic travel expenses (NatClass D814) that is categorized only by Level 2 Funding sources (such as Undesignated Operating or Endowment Distribution).

The table below shows the levels at which you budget as part of the central budget stage:

Segment	Level	Example
Entity	Child	20: College Only
Org	Level 3	L41: Outdoor Programs
Funding	Level 2	U2UDPR: Undesignated Operating
Natural Class	Level 4	D846: Licenses and Fees
Activity/ Subactivity	All Activities & Subactivities	Not Applicable

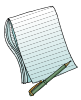
DeptBudg

The department budget is the detailed child level budgeting that goes on each year for specific fundings, activities, subactivities, and natural classes. The subactivity values have been appended to the Activity values. For example, to select Activity 701350 (Regular Season) and Subactivity 1238 (Princeton University), select A:701350:1238 Regular Season:Princeton University.

General Guidelines

In order to work on your budget forms, you need to become familiar with the application and the ways you can use it. The first few sections of the manual describe how to access the application, how the data is structured within forms, what functions are available, and how to work with forms in the Planning application.

It is also possible to work with budget data in Excel using Smart View, an add-on program that allows you to connect to the data source and open forms online. Instructions on how to set up Smart View, use data forms within Excel, and save data to the Planning server are described in the later sections of the manual.



NOTE: It is important to understand that when you use Excel you are viewing and editing Hyperion Planning forms, not Excel files. Although you can download or save forms as Excel files, you cannot upload those files back to the Planning server. In order to use data in an Excel file, you need to copy and paste the data from the Excel file back into your Hyperion Planning forms.

Working in Hyperion Planning assumes you are familiar with the structure of the chart of accounts and where the segment values you budget against exist. You can examine a hierarchical view of the Entity, Org, Funding, Activity, and Natural Class segment values using the Segment Hierarchy Listing report within Financial Reports.

Keep Your Data in Sync

When working in Hyperion Planning it is important to understand that saving data and running calculations are two separate operations. When you save data it is stored on the server, but you will not see how that data affects your totals because calculations are not run automatically.

To ensure that reports run on higher level Orgs are accurate, the data for the entire cube must be aggregated (or rolled up).

In the DeptBudg budget cycle (not applicable to CentBudg) you can perform the calculations by running the business rule for the Entity/Org you are working in. Once the rule runs and your form is refreshed you can then see the updated totals. This only affects the current Entity/Org combination – it does not run an aggregation of the entire cube. That occurs every night at 9 p.m. to ensure that saved data and calculations stay in sync and that higher level reports are accurate. You must be logged out of the system when this occurs.

Set-up instructions

A link to Hyperion Planning is available on the Budget Planning Tools page at: http://www.dartmouth.edu/~budget/tools/index.html. Internet Explorer version 8 is the only officially supported browser for Hyperion Planning.

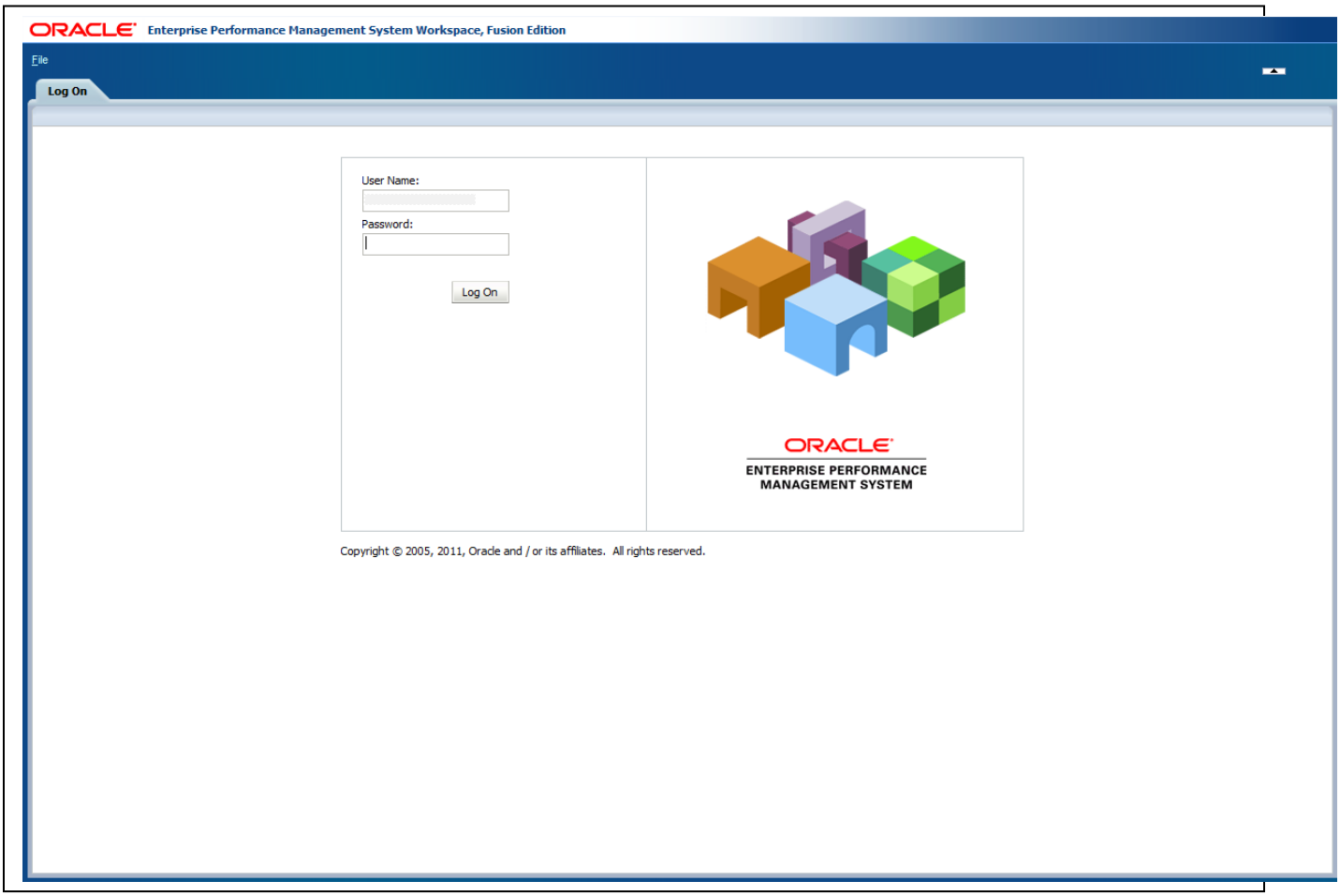
Because of the constraint on screen space, it is recommended that you increase monitor resolution to as high as comfortable. To do this, on the desktop click **Start**, point to **Settings**, click **Control Panel**, and then double-click **Display**. Click the **Settings** tab and drag the Screen Resolution slider to the right. Click **OK**.

Your browser should be set up to allow pop-ups. In Internet Explorer, select **Tools** from the menu bar, choose **Internet Options,** select the **Privacy** tab, and clear the **Block pop-ups** checkbox. Make sure the Google and Yahoo toolbar pop-ups are off as well.

If you are using Internet Explorer 8 (IE8) to access Hyperion Planning, you must make a change to one of the Internet Options settings in order to run the application.

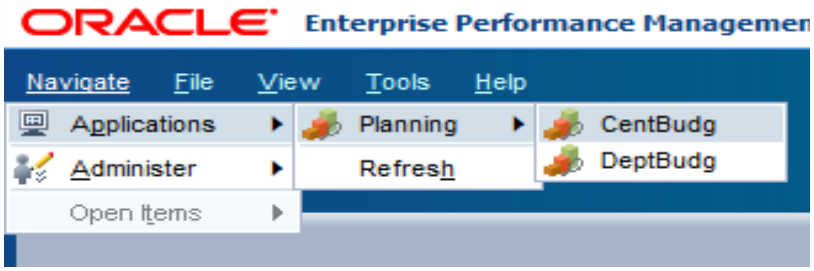
1. In Internet Explorer 8, navigate to the Hyperion log in page. (Presently, this is https://bi.dartmouth.edu/workspace/index.jsp).
2. From the **Tools** menu click **Internet Options**.
3. Click the **Security** tab, select **Local intranet** and then click **Sites**.
4. Click **Advanced**.
5. The website should be shown in the **Add this website to the zone** field. (Make sure the **Require server verification (https:) for all sites in this zone** checkbox is selected.) Click **Add**.
6. Click **Close** and then click **OK**.
7. With the **Local intranet** zone selected, click **Custom level**.
8. Under Miscellaneous, enable **Allow script-initiated windows without size or position constraints**.
9. Click **OK** and then click **OK** to close the Internet Options dialog.

Signing inUse your NetID and password.

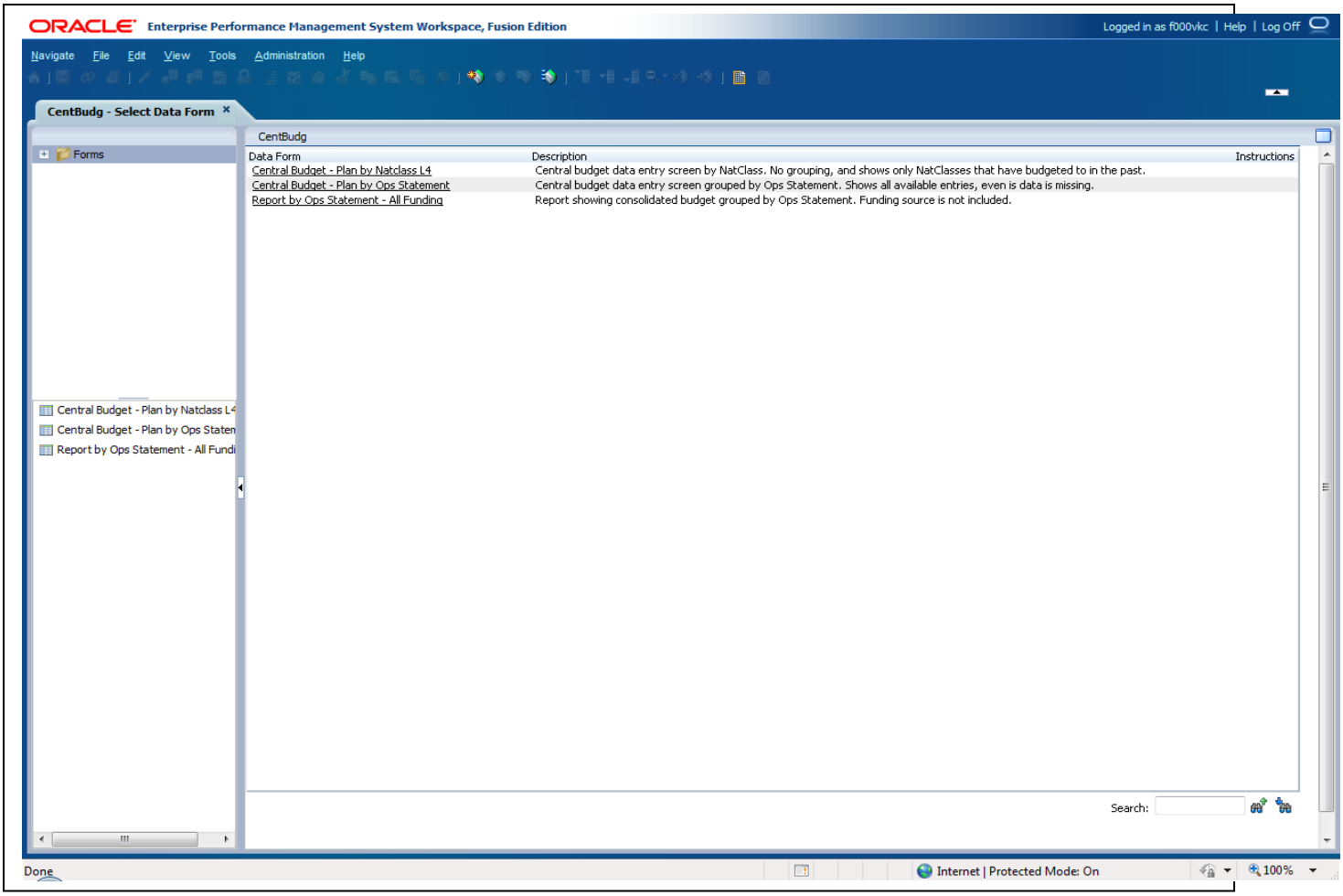


Use the "Navigate" button to access Hyperion Planning. There are two Planning applications: Central Budget (which is the top-down budget for the first round of the Board of Trustees meetings) and Department Budget (the detailed budget that is created each year for final Board approval).

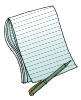
Navigate → Applications → Planning → CentBudg
Navigate → Applications → Planning → DeptBudg



This opens the workspace as shown below. The left side of the screen is the View Pane and the right side of the screen is the Content area.


ORACLE Enterprise Performance Management System Workspace, Fusion Edition
Logged in as f000vkc | Help | Log Off
Navigate File Edit View Tools Administration Help
CentBudg - Select Data Form
Forms
Central Budget - Plan by Natclass L4
Central Budget - Plan by Ops Staten
Report by Ops Statement - All Fundi
CentBudg
Data Form
Description
Instructions
Central Budget - Plan by Natclass L4
Central budget data entry screen by NatClass. No grouping, and shows only NatClasses that have budgeted to in the past.
Central Budget - Plan by Ops Statement
Central budget data entry screen grouped by Ops Statement. Shows all available entries, even is data is missing.
Report by Ops Statement - All Funding
Report showing consolidated budget grouped by Ops Statement. Funding source is not included.
Search:
Done
Internet | Protected Mode: On
100%

You can execute the **Navigate → Applications → Planning → *Budgetname*** command multiple times to open multiple tabs so that you can work on different web forms within the same Workspace session.



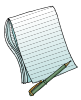
NOTE: Do not open multiple Hyperion Workspace sessions in separate browser windows. Instead, use separate tabs in the same Hyperion Workspace session to access multiple Planning web forms.

Forms

In each cube, the View Pane contains a folder with the forms for your budget work. The forms are available either on the web or through Smart View in Excel.

The forms provide different ways to view and enter budget information for chosen Entity/Org/Funding combinations. Only those Entity/Org/Funding combinations that you have access to are visible on your forms.

Select the form from either location. It opens in the Content area.



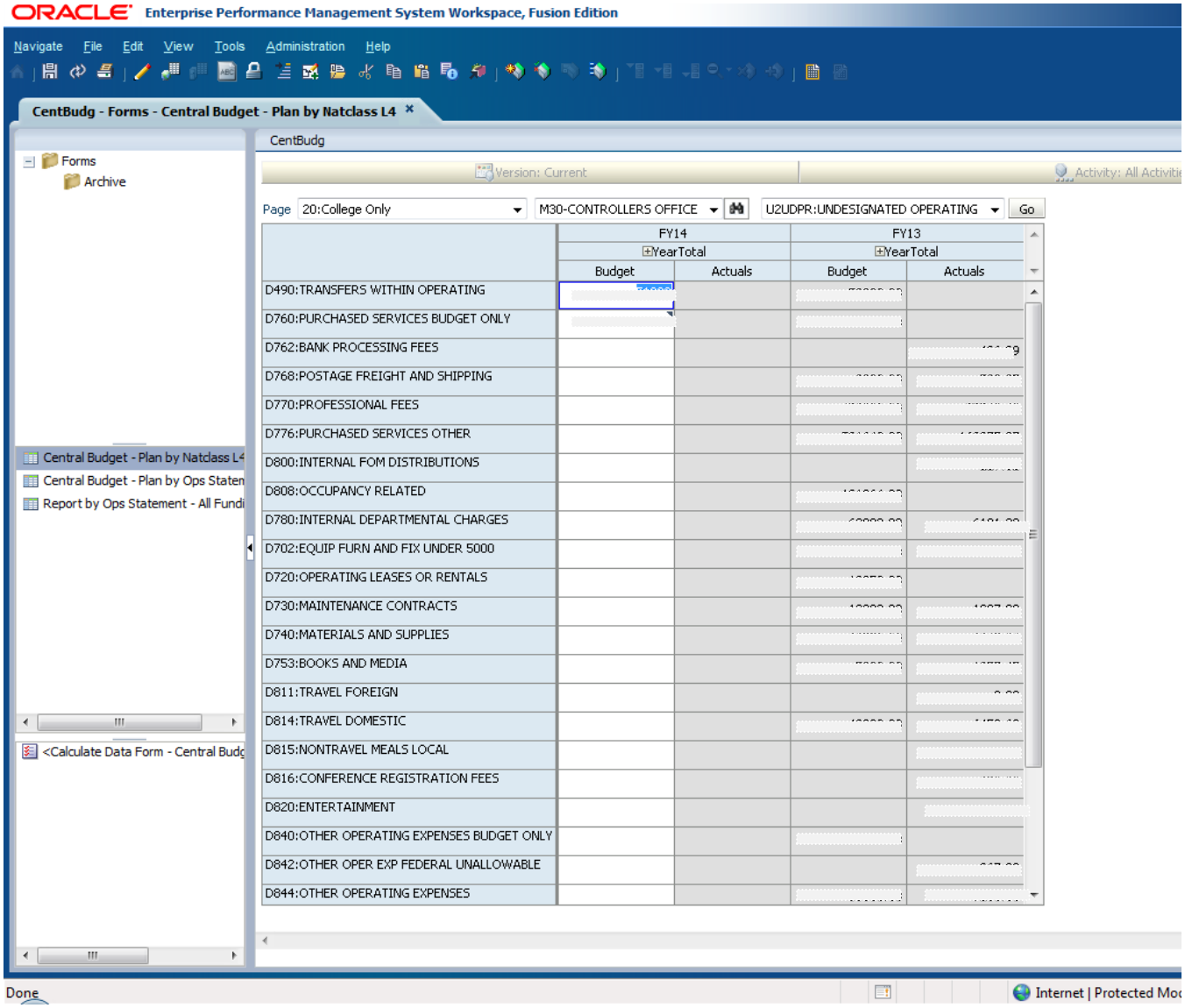
NOTE: Not every form necessarily contains data. If the message "*There are no valid rows of data for this data form*" appears at the top of the content area, there is no data in that form. Make sure the Entity, Org and Funding values are set properly.

Using the same form, but choosing a different Entity/Org/Funding combination in the "Page" pull-down menus results in a different set of NC data. (Note: You must click the **Go** button after changing one of the choices in the pull-down menus in order to see the new form.)

CentBudg Forms

There are 2 planning forms listed here: *Central Budget - Plan By NatClass L4*, and *Central Budget - Plan by Ops Statement*. The two planning forms access the same data, but are organized differently. The *Central Budget - Plan By NatClass L4* form allows you to budget at the NatClass Level 4, based on prior budget entries. Only NatClasses that have been budgeted to the in the past will appear here. The *Central Budget - Plan by Ops Statement* form allows you to view the input form based on Ops Statement groupings and subtotals. If a NatClass is missing from *Central Budget - Plan By NatClass L4,* refer to *Central Budget - Plan by Ops Statement,* as all available NatClasses are listed in this form, regardless of prior budgeting.

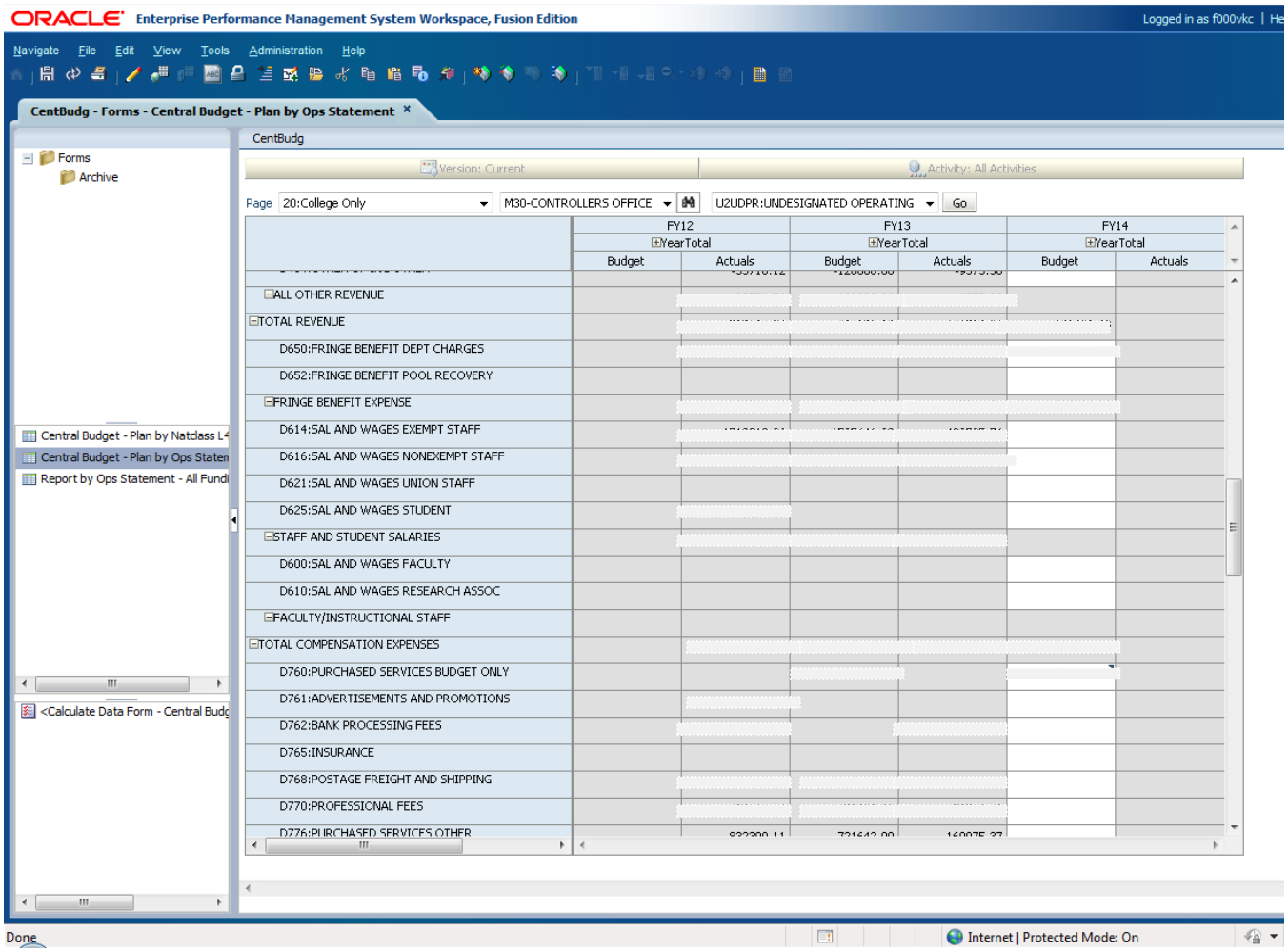
Central Budget - Plan By NatClass L4:



This form (for M30:Controllers Office, U2UDPR:Undesignated Operating) shows corresponding Level 4 Natural Classes used.

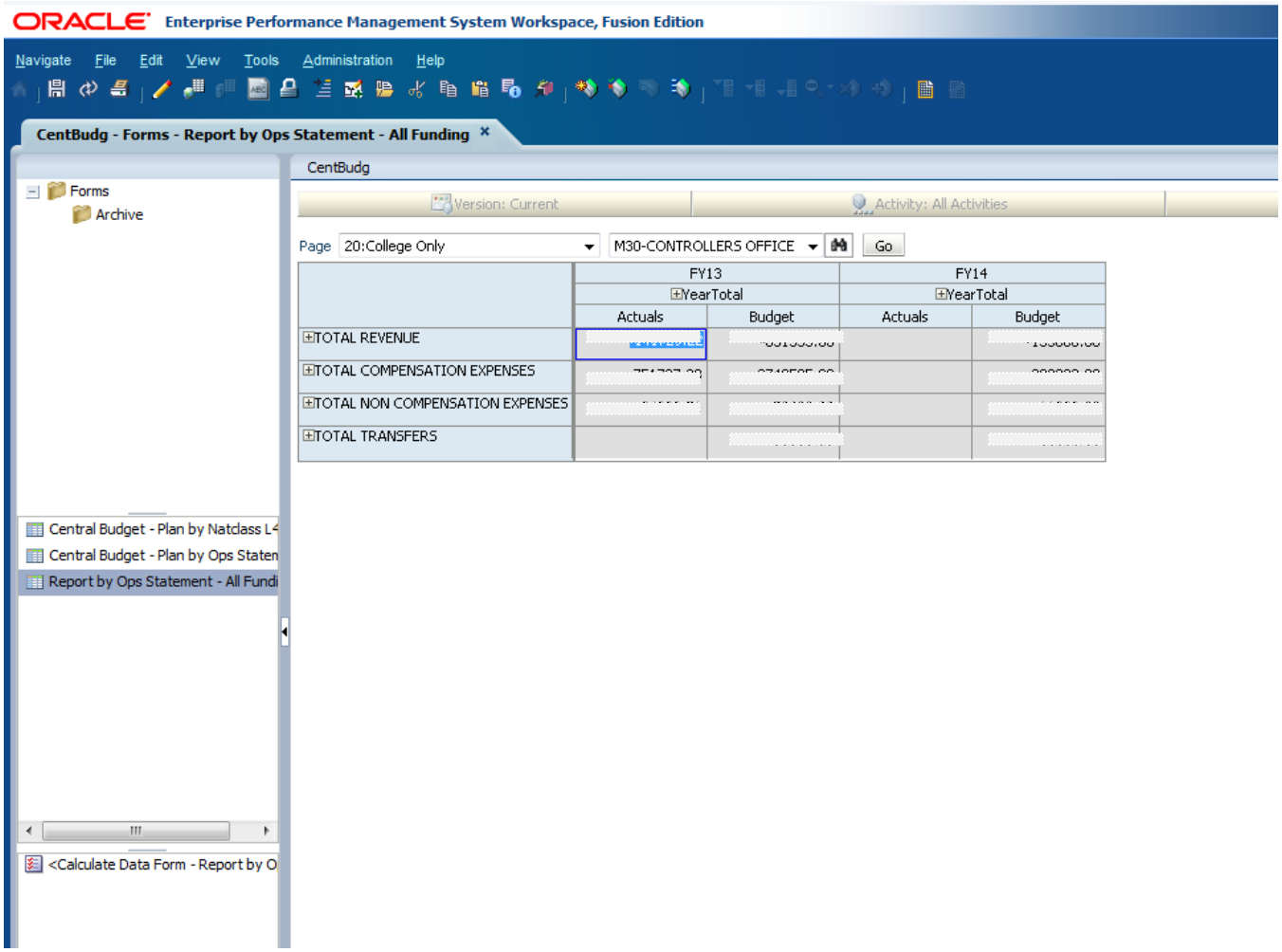
The form includes all Activities and Subactivities; they are not broken out at any level in the CentBudg cube.

Central Budget - Plan By Ops Statement:



Like the prior form, this form (for M30: Controllers Office, U2UDPR:Undesignated Operating) shows corresponding Level 4 Natural Classes. However, this form is much longer, as it allows the user access to all NatClasses, regardless of budget history, as well as subtotals based on the Ops Statement.

Finally, there is 1 report offered in CentBudg that consolidates all funding, and aggregates all data into the Ops Statement. Note that this is a read-only report, it is not meant for data entry. Users have the ability to drill down into each category, all the way to the NatClass level.



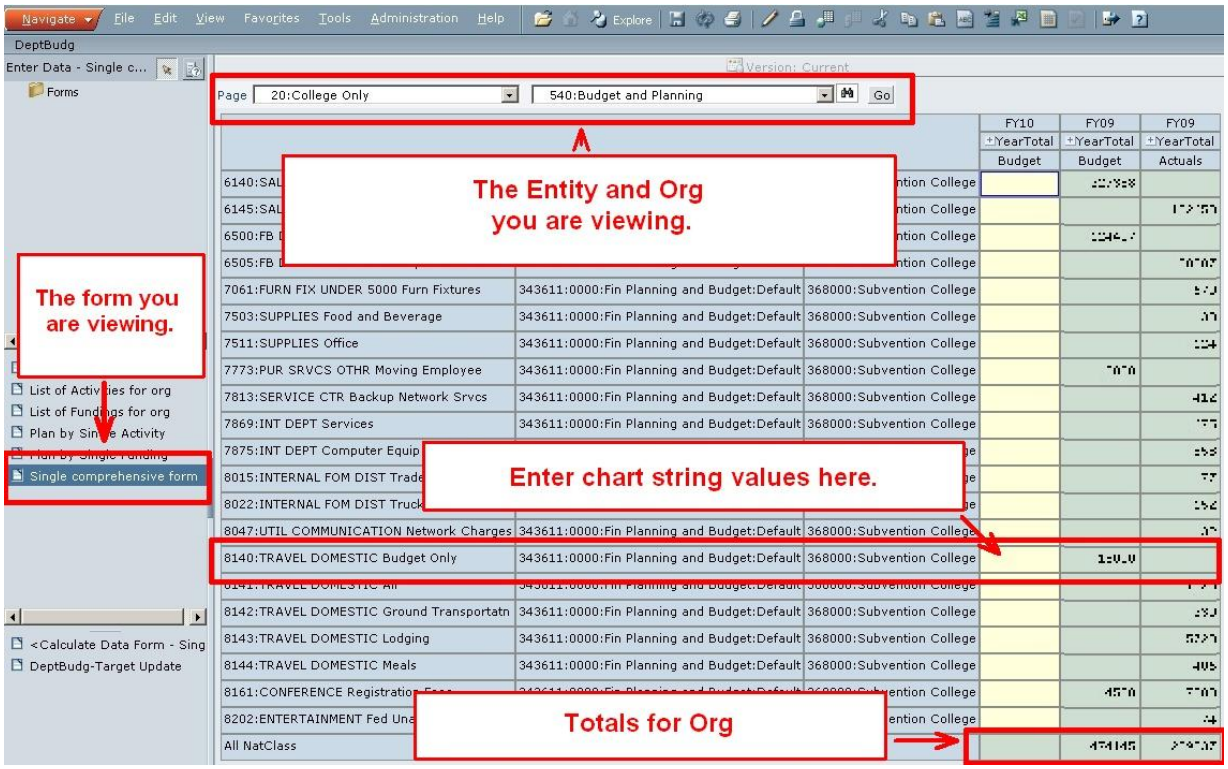
DeptBudg Forms

There are three different ways to approach the DeptBudg forms. Which way you choose depends on how you prefer to work and the complexity of your budget. The three options are

- use one form that contains all your data
- plan by funding
- plan by activity

1) One Form with Everything

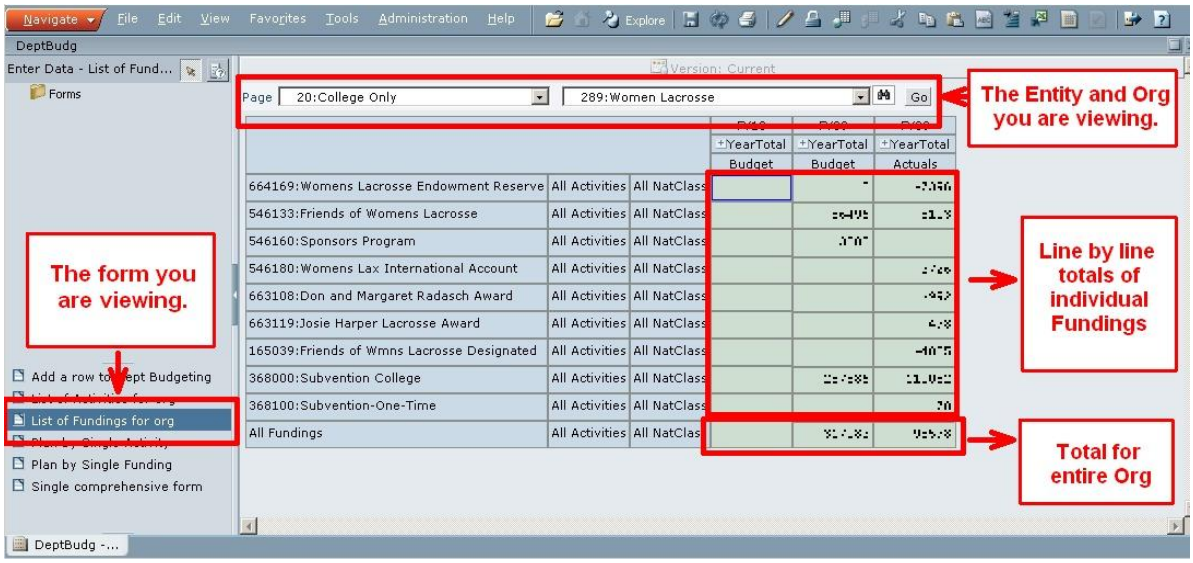
If your organization's budget is simple and straightforward (very few funding sources or activities) and you would like to see everything on one form, select *Single comprehensive form*. This form contains everything in your budget on one form and organizes it by Natural Class, Funding, and Activity.


The Entity and Org you are viewing.
The form you are viewing.
Enter chart string values here.
Totals for Org
Single comprehensive form

You cannot reorder the columns either on the web or in Smart View if you use this form.

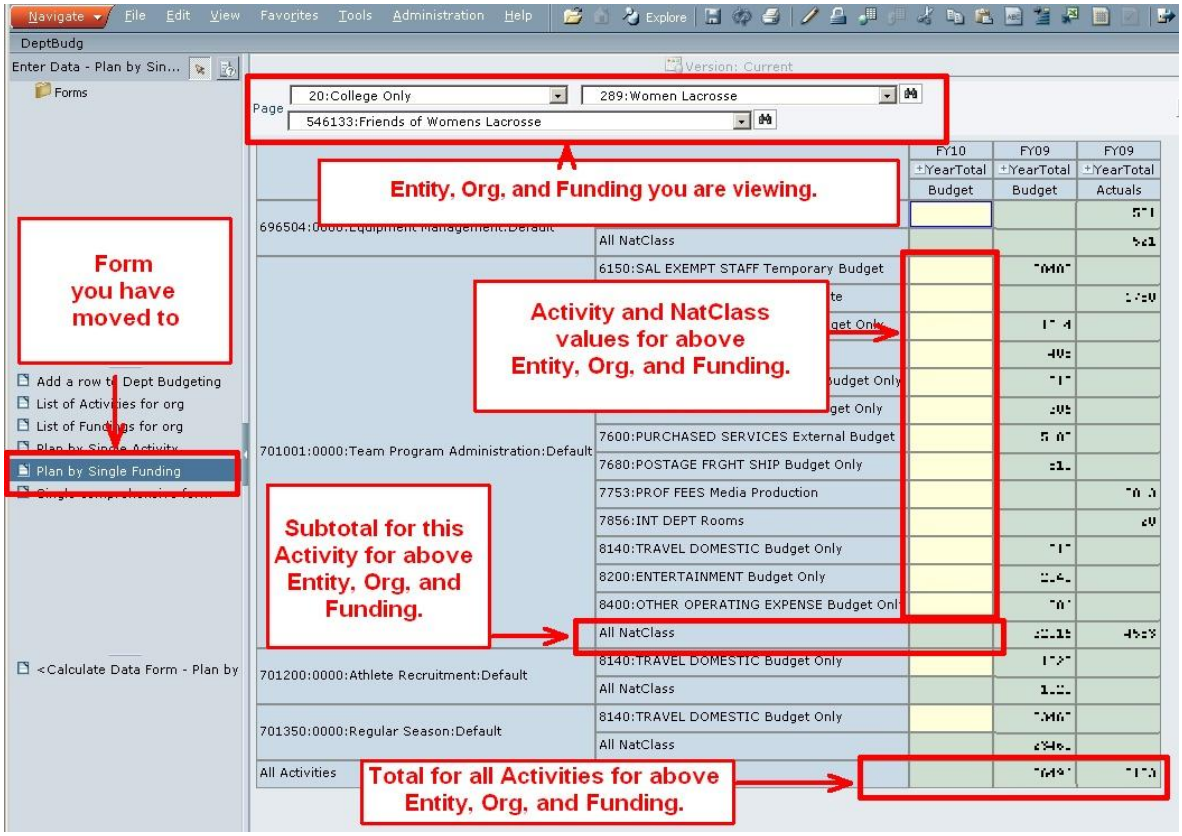
2) Plan by Funding

If you want to work on your organization's budget by Funding source, select the *List of Fundings for the org* form. This brings up a read-only form that lists all the funding sources for your organization.


The Entity and Org you are viewing.
The form you are viewing.
Line by line totals of individual Fundings
Total for entire Org
List of Fundings for org
Plan by Single Funding
Single comprehensive form

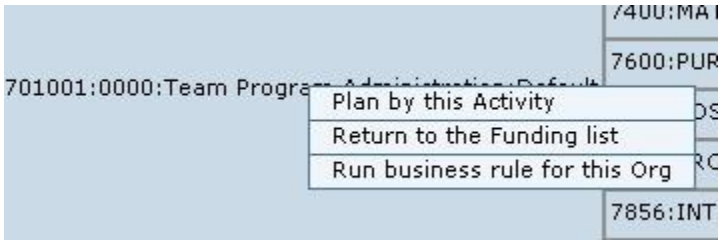
To drill into a specific funding and enter data there, position the cursor over the name of a Funding, right-click the mouse, and select *Plan by this Funding*.

This opens up a form for this Org that contains just the strings for that Funding. You can then enter budget data on that form.


Entity, Org, and Funding you are viewing.
Form you have moved to
Activity and NatClass values for above Entity, Org, and Funding.
Subtotal for this Activity for above Entity, Org, and Funding.
Total for all Activities for above Entity, Org, and Funding.
Plan by Single Funding
701001:0000:Team Program Administration:Default
701200:0000:Athlete Recruitment:Default
701350:0000:Regular Season:Default
All Activities

Note: You could go directly to the *Plan by Single Funding* form but all the possible Funding sources appear in the dropdown menu at the top of the page. Starting from the *List of Fundings for org* form displays only the Fundings used for the org and gives you an easy way to go to the proper *Plan by Single Funding* form.

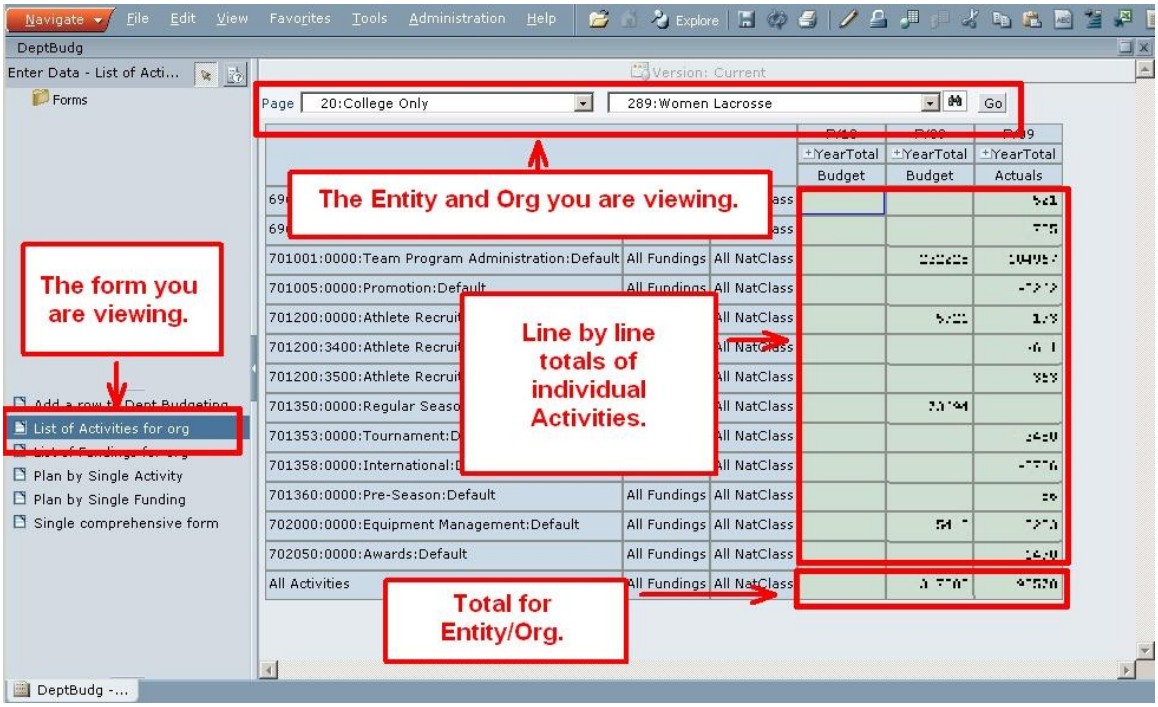
Once you save your data and run the business rule, the totals and subtotals displayed on the form will be updated. You can return to the *List of Fundings* form for the Org either by selecting it from the list in the View pane or by right-clicking the mouse and choosing *Return to the Funding list*.



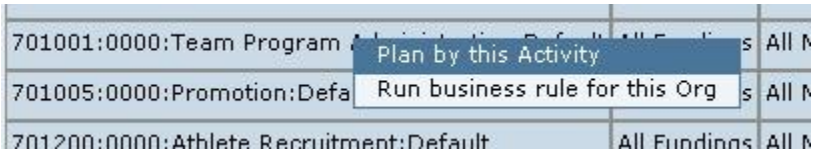
You could also position the cursor over an activity on the form, right-click, and choose *Plan by this Activity* to go to a form that contains just the budget data for that Activity.

3) Plan by Activity

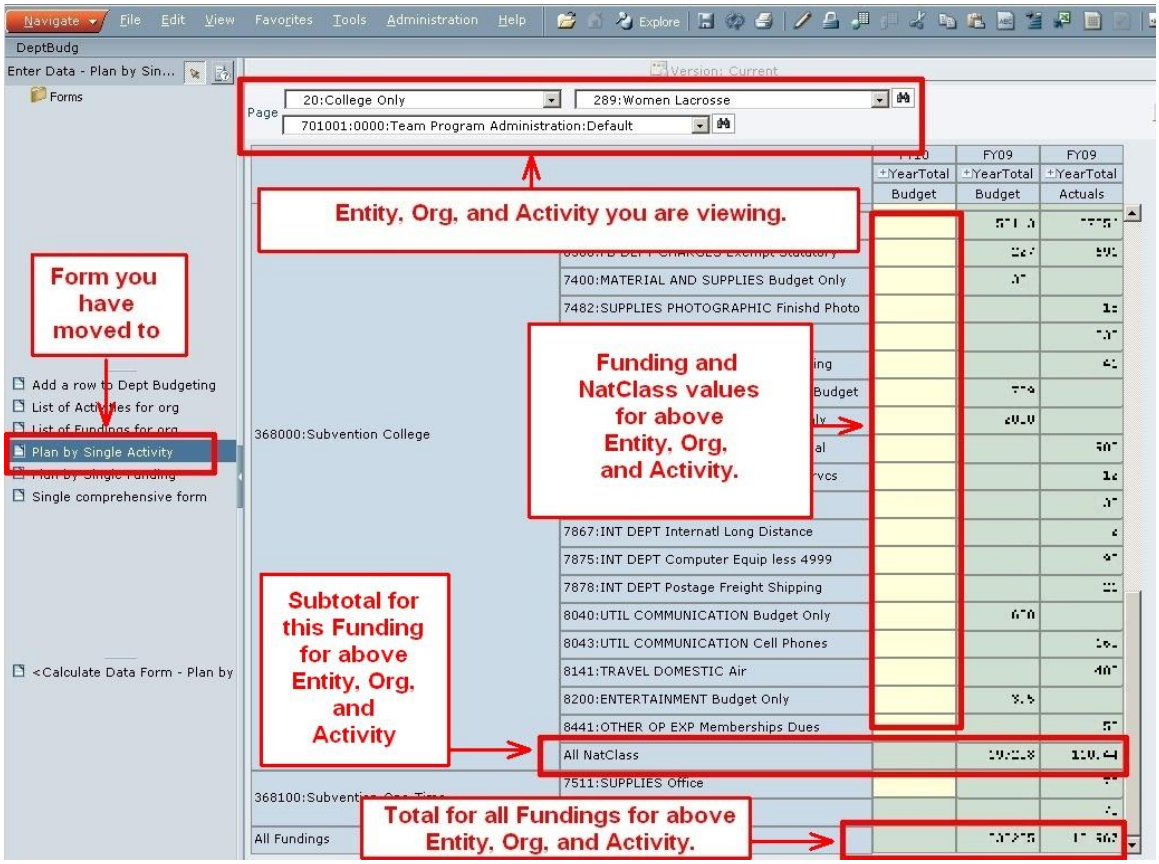
If you want to work on your organization's budget by Activity source, select the *List of Activities for the org* form. This brings up a read-only form that lists all the activities for your organization.


The Entity and Org you are viewing.
The form you are viewing.
Line by line totals of individual Activities.
Total for Entity/Org.
List of Activities for org
Plan by Single Activity
Plan by Single Funding
Single comprehensive form

To drill into a specific activity and enter data there, position the cursor over the name of an Activity, right-click the mouse, and select *Plan by this Activity*.

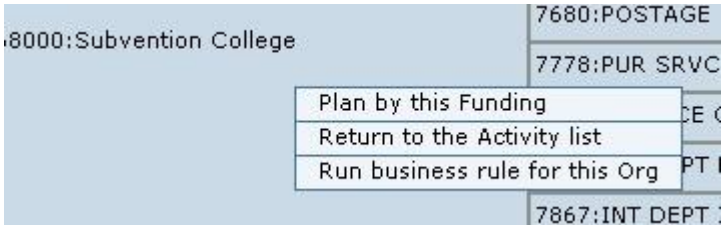


This opens up a form for this Org that contains just the strings for that Activity/Subactivity. You can then enter budget data on that form.


Entity, Org, and Activity you are viewing.
Form you have moved to
Funding and NatClass values for above Entity, Org, and Activity.
Subtotal for this Funding for above Entity, Org, and Activity
Total for all Fundings for above Entity, Org, and Activity.
Plan by Single Activity
Add a row to Dept Budgeting
List of Activities for org
Single comprehensive form
368000:Subvention College
7400:MATERIAL AND SUPPLIES Budget Only
7482:SUPPLIES PHOTOGRAPHIC Finishd Photo
7867:INT DEPT Internatl Long Distance
7875:INT DEPT Computer Equip less 4999
7878:INT DEPT Postage Freight Shipping
8040:UTIL COMMUNICATION Budget Only
8043:UTIL COMMUNICATION Cell Phones
8141:TRAVEL DOMESTIC Air
8200:ENTERTAINMENT Budget Only
8441:OTHER OP EXP Memberships Dues
All NatClass
7511:SUPPLIES Office
All Fundings

Note: You could go directly to the *Plan by Single Activity* form but all the possible Activity sources appear in the dropdown menu at the top of the page. Starting from the *List of Activities for org* form displays only the Activities used for the org and gives you an easy way to go to the proper *Plan by Single Activity* form.

Once you save the form and run the business rule, the totals and subtotals displayed on the form will be updated. You can return to the *List of Activities* form for the Org either by selecting it from the list in the View pane or right-clicking the mouse and choosing *Return to the Activity list*.



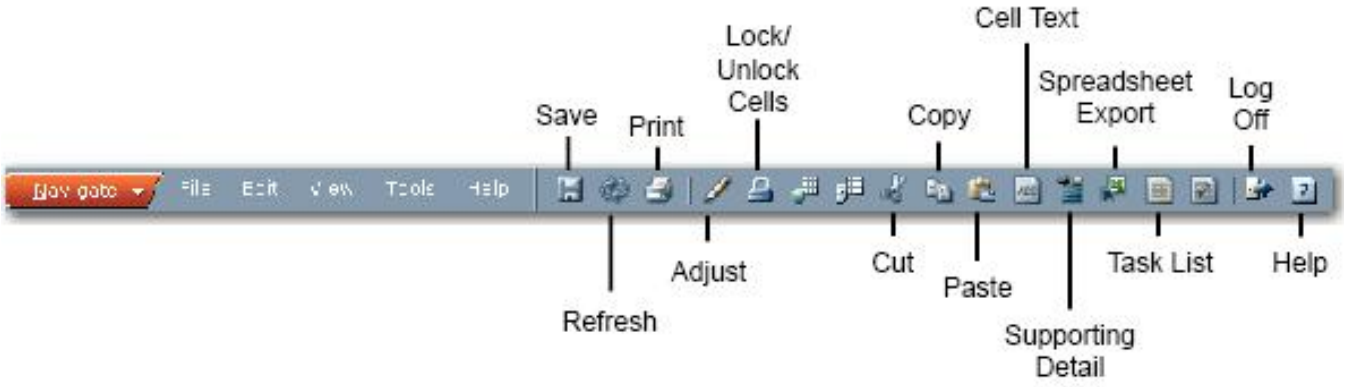
You could also position the cursor over a Funding on the form, right-click, and choose *Plan by this Funding* to go to a form that contains just the strings for that Funding.

Hyperion Planning Functionality

Color codes

Pale Yellow	Data entry available
Darker Yellow	Data has been changed and not yet saved ("dirty cells")
Gray-green	Data entry prohibited
Darker blue	Supporting detail attached (see toolbar command below)
Brown	Cell is locked

Toolbar Commands



Save

This command saves all the changes made to the web form and stores them on the server. [Same as **File→ Save**] Your remaining totals will not automatically update when you save. In order to see how the changes you make affect your totals, you must run the business rule for the current org (which runs the calculations on the data). See *Saving Data and Running Business Rules* in the next section for further details.

Refresh

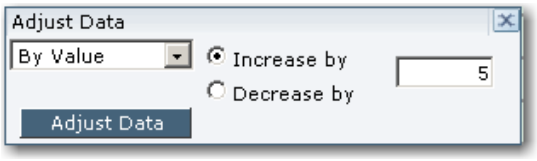
This command reverts any unsaved data back to the values stored since the last save took place. It will NOT save changes and provides a warning to that effect. NOTE: There is no "Undo" command. Save regularly and use Refresh to "Undo" to the last save. [Same as **View→ Refresh**]

Print

Allows print settings and a print preview. [Same as **File→ Print**]

Adjust

A given cell value can be decreased or increased by either a value or a percentage (choose from a drop-down menu). Fill out the pop-up window as desired and click **Adjust Data**. [Same as **Edit→ Adjust**] You can also do this directly in a cell, see *Entering Data Within Forms.*



Lock/Unlock Cells

This command will lock and unlock a given cell, with locked cells showing as brown. To unlock, position the cursor back on the brown cell and click the command again. Use Shift-click to select multiple cells to lock or unlock. [Same as **Edit→ Lock/Unlock Cells**]

Cut

Cut cell contents. Shift-Click to select multiple cells to cut. [Same as **Edit→ Cut**]

Copy

Copy cell contents. Shift-Click to select multiple cells to copy. [Same as **Edit→ Copy**]

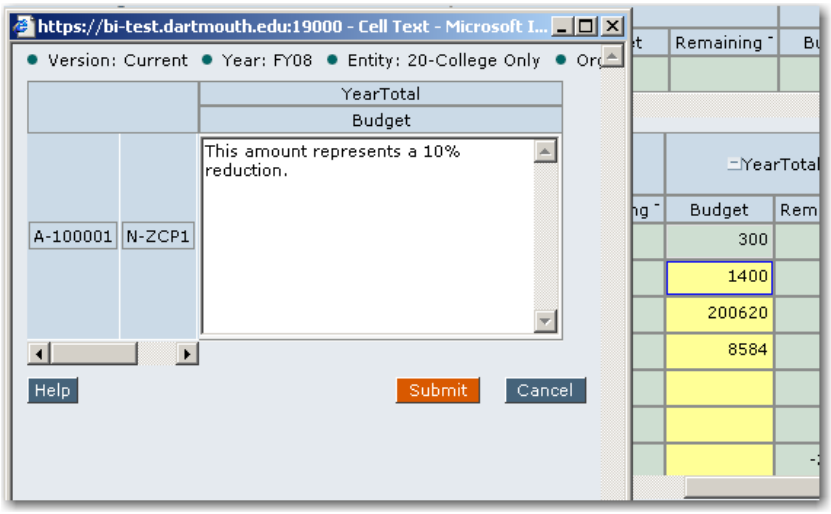
Paste

Paste previously cut or copied data. Multiple cells will be pasted in the same order as they were cut or copied. [Same as **Edit → Paste**]

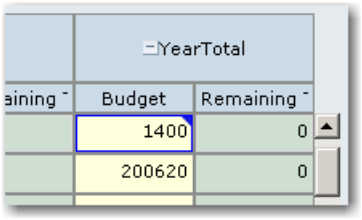
NOTE: You can use cut, copy, and paste across applications, for example, to copy data from an Excel file.

Cell Text

This command allows you to add notes to a given cell.



A blue triangle appears marking a cell with text attached.



To see text, highlight the marked cell and re-click Cell Text. [Same as **Edit→ Cell Text**]

Supporting Detail

This command allows you to add supporting details, in the form of calculations, to aggregated lines, such as travel. This provides a way for you to drill down into data and to understand the basis of that data.

To see the detail, double-click on the cell or click Supporting Detail again while on the cell.

Double-clicking on unlocked available cells also opens up the Supporting Detail box. [Same as **Edit→ Supporting Detail**]

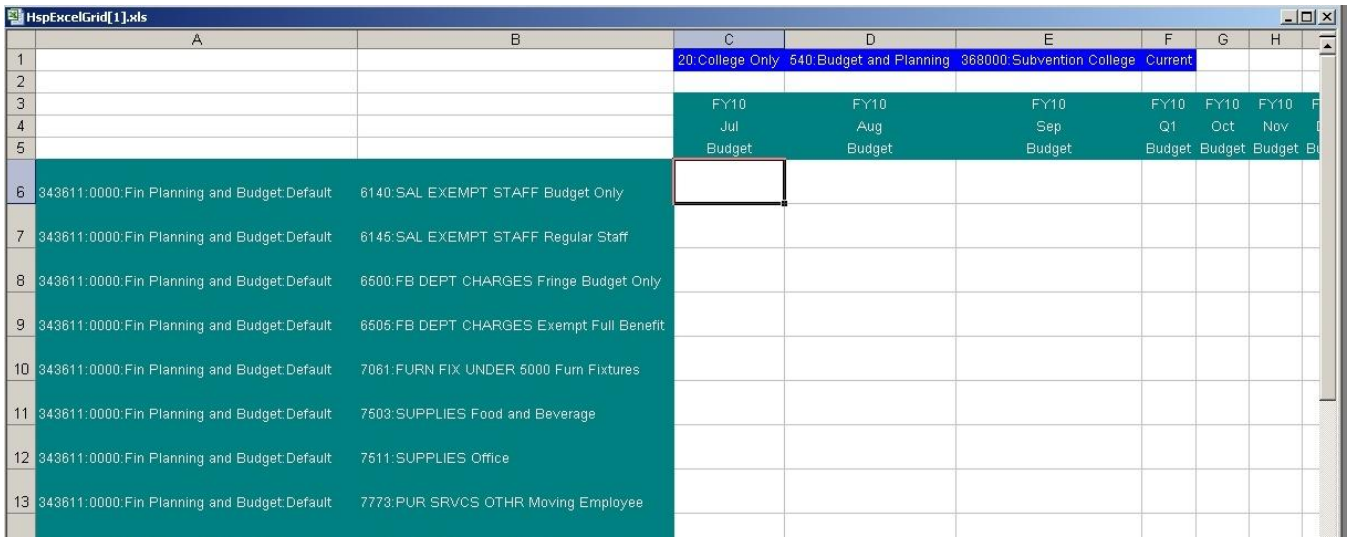
NOTES:

- You can only add supporting detail to a cell at the monthly level; you cannot add supporting detail to cells representing yearly or quarterly data.
- When you add supporting detail, a separate window appears in which you enter and save your calculations. That data is saved on the server at that time.

For a step-by-step procedure on how to add supporting detail, see *Adding Supporting Detail* in the *Working with Forms in Hyperion Planning* section.

Spreadsheet Export

This exports a minimally-formatted spreadsheet version of the web form. Values are exported, with no formulas. Supporting detail is broken out as separate lines. [Same as **File→ Spreadsheet Export**]



HspExcelGrid[1].xls

	A	B	C	D	E	F	G	H
1			20:College Only	540:Budget and Planning	368000:Subvention College	Current		
2								
3			FY10	FY10	FY10	FY10	FY10	FY10
4			Jul	Aug	Sep	Q1	Oct	Nov
5			Budget	Budget	Budget	Budget	Budget	Budget
6	343611:0000:Fin Planning and Budget:Default	6140:SAL EXEMPT STAFF Budget Only						
7	343611:0000:Fin Planning and Budget:Default	6145:SAL EXEMPT STAFF Regular Staff						
8	343611:0000:Fin Planning and Budget:Default	6500:FB DEPT CHARGES Fringe Budget Only						
9	343611:0000:Fin Planning and Budget:Default	6505:FB DEPT CHARGES Exempt Full Benefit						
10	343611:0000:Fin Planning and Budget:Default	7061:FURN FIX UNDER 5000 Furn Fixtures						
11	343611:0000:Fin Planning and Budget:Default	7503:SUPPLIES Food and Beverage						
12	343611:0000:Fin Planning and Budget:Default	7511:SUPPLIES Office						
13	343611:0000:Fin Planning and Budget:Default	7773:PUR SRVCS OTHR Moving Employee						

NOTE: This method of downloading provides no connection between Excel and Hyperion Workspace. To work with forms in Excel, please see the sections on setting up and using Smart View later in this manual.

Task List

Task lists may be used to track "to do" items during the planning process. This command displays current task list(s) in a separate window for reference. [Same as **View→ Task Lists**]

Log Off

This logs you off Hyperion Workspace; a warning appears to verify the request. [Same as **File→ Log Off**]

Help

This accesses the Hyperion Planning searchable User's Guide. This is the user's guide Hyperion installs and does not address Dartmouth-specific issues. [Same as **Help→ Help on This Topic**]

Working with Forms in Hyperion Planning

This section describes some of the operations you can perform when working with forms in Hyperion Planning. It also includes some general guidelines of the best practices to follow.

BEST PRACTICES:

When initially accessing a web form in DeptBudg, refresh the display before you enter data. Refresh (which can be run by clicking the Refresh button or choosing **Refresh** from the **View** menu) updates your view. Changes made in a web form on one tab may affect the data in another and refreshing before beginning work will update the view. In DeptBudg, you may also want to run the business rule which updates page totals using the latest saved data. Until calculations are run, the budget totals you see on the forms may not reflect the true totals. Running the rule ensures that the latest saved changes are applied to the totals on the forms. (There is no business rule in CentBudg.)

Entering Data within Forms

When the web forms open, they display annual totals by default. You can enter data there or you can click the plus sign (+) in the column heading to display quarters or monthly periods and enter data in them.

When you enter data in the YearTotal, it automatically distributes across quarters and months. When you enter data in the quarters or months, it automatically updates the year total.

Jul	Aug	Sep	−Q1	+Q2	+Q3	+Q4	−YearTotal
Budget	Budget	Budget	Budget	Budget	Budget	Budget	Budget
100	100	100	300	300	300	300	1200

You can change an existing value in a form using one of the following operators: + to add, +- to subtract, * to multiply, / to divide, and % to change by a percentage. For example, if the value in a cell is 500, selecting that cell, typing %80 and pressing Enter, changes the value to 400.

You can navigate within the forms using the following keys (which all work in the same way they do in Excel):

Key	Result
Enter	Enters the value you typed and moves the cursor to the cell below.
Tab	Enters the value you typed and moves the cursor to the next cell in the row.
Shift + Tab	Enters the value you typed and moves the cursor to the previous cell in the row.
Esc	Cancels the value you typed and restores the previous value.
← → ↑ ↓	Moves the cursor to the adjacent cell in the direction of the arrow.

Saving Data and Running the Business Rule

When you save the changes you make on a web form, they are stored on the server. If you make a mistake as you are working, you can click **Refresh** to display the form again with the last saved values from the server. When you are done working on a form, make sure you save the form before moving to another form or another Entity or Org.

Saving data does not automatically perform calculations and update the totals on your forms.

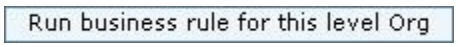
In the CentBudg and DeptBudg cubes, you can run the business rule to update the totals on your Org's forms. This affects just the current Org, not the parents of the Org (the school or division). By default, the entire cube is aggregated each night at 9 p.m. so if you do not run the rule, your totals will be correct at the start of the next day. You must be logged out of the cube during the aggregation and the construction of the reporting cube which completes by 10 p.m.

To run the Business Rule:

There are now two ways in which to run the business rule.

Method 1: The simplest and preferred method.

While on a form, position the mouse over the left side of the form, right-click the mouse, and choose **Run Business rule for this level org** from the context-sensitive menu that appears.



Select that command. The business rule window appears with the Entity and Org value of the current form already filled in.

Click OK to run the business rule

Method 2: Used in the previous year still works but takes more steps and requires manual entry.

1. Choose **Tools→ Business Rules** from the Hyperion menu.

   The Select Rule screen appears.

2. Click **Launch**.

   The Run Time Prompts screen appears.

Run Time Prompts - Target Update
Please enter a single Entity with quotes (ex: "E:00"):
Please enter Orgs with quotes and separated by commas (ex: "O:000", "O:001"):
Launch
Go Back

3. Enter the entity on which to run the business rules and the org or orgs on which to run them. You can enter multiple orgs here, using the **O:** prefix before each org number and separating them with commas.

4. Click **Launch**.

   It will take a few moments for the rules to run. When they are complete, the Select Rule screen re-appears. This screen remains in the Content area until you select a form to view. In the View pane select your form and choose Refresh to see the updated remaining totals. The remaining totals are also updated on any other forms in your org that are affected.

Special Notes on Saving Data

If you try to select another form or a different Entity or Org without saving all the data you entered, a warning message appears. Read it carefully. The messages for those two cases are similar but they have very different consequences.

This message appears if you select a different Entity or Org without saving all your data.

Microsoft Internet Explorer
There is unsaved data. If you proceed, this data will be lost.
Select OK to save the data or select Cancel to continue without saving the data.
(Warning: If you have closed your browser then your data cannot be saved)
OK
Cancel

Clicking OK saves your data and displays the new Entity/Org data.

Clicking Cancel discards your changes and displays the new Entity/Org data.

This message appears if you select a different form without saving all your data.

Microsoft Internet Explorer
Are you sure you want to navigate away from this page?
All unsaved changes will be lost.
Press OK to continue, or Cancel to stay on the current page.
OK
Cancel

Clicking OK discards your changes and displays the new form.

Click Cancel leaves you on the same form.

Viewing a Different Entity or Org

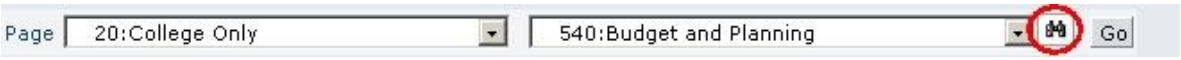
When you select a different web form, your current Entity/Org settings are automatically applied to the form and appear automatically. If you want to view a different Entity or Org in the current form, you need to choose these from the drop-down lists at the top of the form and then click the **Go** button to display them. (The order of the Orgs is not alphabetic or numeric so it can be cumbersome to select it directly if you have access to many.)

The following procedure describes how to view different Entities or Orgs.

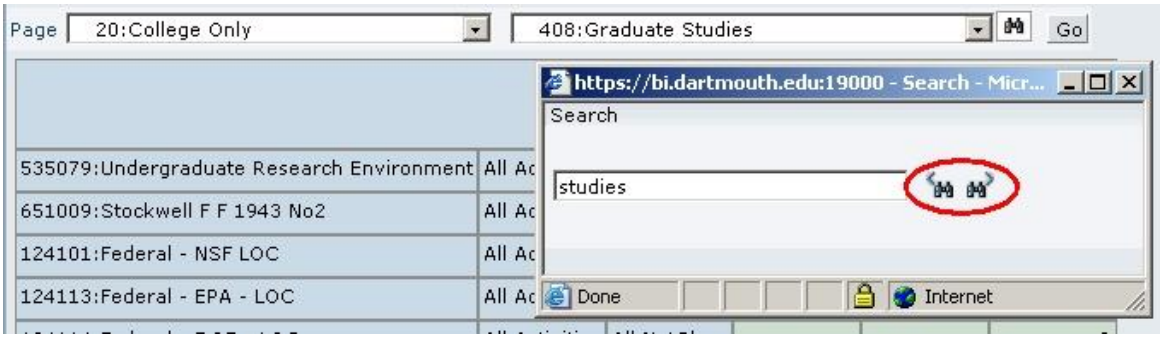
To view a different Entity or Org:

1. In the Page area (at the top of the Content pane), if the entity displayed is not the entity in which the org exists, click on the first pull-down menu and select the correct entity.

2. Click on the second pull-down menu, scroll up or down the org list, and select the org for which you want to see the budget data.
   or…
   Click the binoculars icon beside the second pull-down menu (shown here).

   In the Search box, enter a word within the org name, such as s*tudies*, and click either the back or forward binoculars icon until the correct Org appears in the pull-down menu. (If there is more than one Org that includes the search term, this cycles through all the matching Orgs.)

3. Click the **Go** button.

NOTE: You must click the **Go** button to see the data that corresponds to the new values you have entered. The data does not refresh automatically after you select the items from the pull-down menus.

Adding Supporting Detail

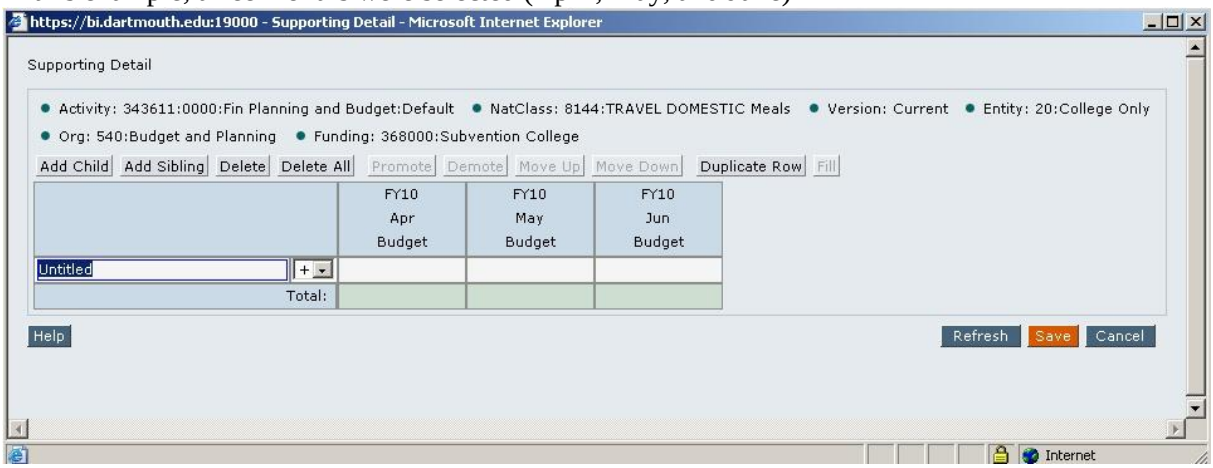
You add supporting detail to a cell when you want to provide explanatory calculations of how you determined an aggregated line value. This provides a way for people to drill down into data and to understand the basis of that data.

You can only add supporting detail to monthly cells. Before you start this procedure make sure you expand your view of budget data so you can see individual months, rather than just the yearly or quarterly values. Click the plus sign (+) in the column heading to open the year or quarter view.

When you add supporting detail you want to break down the various factors that make up the total cost. For example, if you are providing supporting detail for meal costs during domestic travel, you might want to multiply the daily meal rate by the number of days of travel. This example shows you how to do that.

1. Select a monthly cell (or a range of monthly cells in a row) and click (or choose **Edit→ Supporting Detail**) to open the Supporting Detail window.

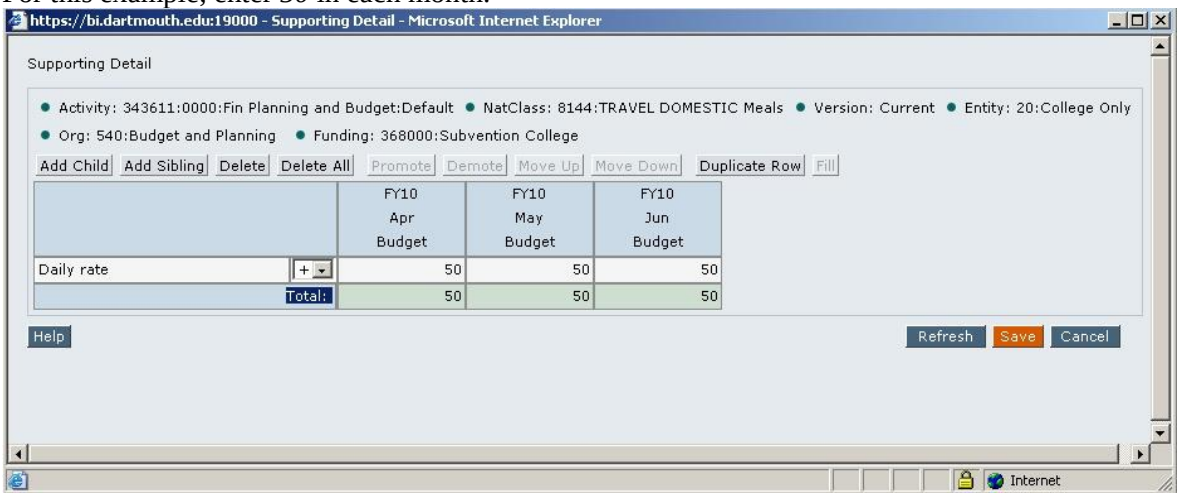
   In this example, three months were selected (April, May, and June)



2. In the highlighted text field, enter a description of a factor that determines the cost.
   For this example, enter *Daily rate*.

3. Press TAB and enter a value in each of the months in which domestic travel will occur.

   For this example, enter *50* in each month.

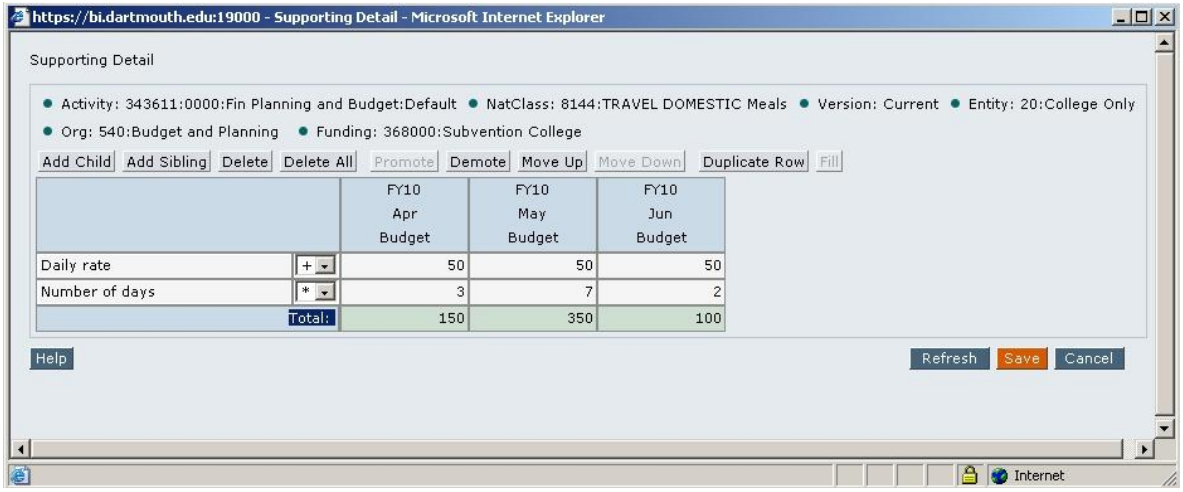


4. Click **Add Sibling** to choose another factor.
   Another text field appears below the first.

5. Enter a description of another factor.
   For this example, enter *Number of days*.

6. Change the math symbol to reflect how the factors are related.
   For this example, change the + sign to a * sign to multiply the two factors.

7. Press TAB and enter a value in each of the months in which domestic travel will occur.
   For this example, enter *3*, *7*, and *2* for the number of days in each month.



The column totals automatically appear.

8. Click **Save**.

	+Q1 Budget	+Q2 Budget	+Q3 Budget	Apr Budget	May Budget	Jun Budget	−Q4 Budget
7778:PUR SRVCS OTHR Printing Ext	2000						
8111:TRAVEL FOREIGN Air							
8113:TRAVEL FOREIGN Lodging							
8141:TRAVEL DOMESTIC Air	3000						
8142:TRAVEL DOMESTIC Ground Tr	3000						
8143:TRAVEL DOMESTIC Lodging	3000						
8144:TRAVEL DOMESTIC Meals				150	350	100	600

The totals from the Supporting Detail page appear on the web form, along with new values for the quarterly and yearly totals. The form is automatically saved to the server.

Budgeting to a Chart String Not in the Forms

There may be occasions when you need to budget against a chart string that does not appear on your forms within Hyperion Planning. In these cases, you will need to add the chart string to your forms.

If your chart string is composed of segment values that already exist in the chart of accounts, complete the *How to Add a Row* procedure below. If you receive an error message telling you that one of the segment values does not exist or you do not have access to it, contact the Financial Planning and Budget Office to request that the segment value be added to the Planning system. (Only those segment values that have transactions posted to them, have been used before in budgeting, or have been added this year automatically appear in the Planning system. Older segment values that do not have any data posted to them will need to be retrieved.)

If your chart string is composed of a segment value that does not yet exist in the chart of accounts, i.e., you want to use a new funding or activity, you must first complete the appropriate chart of accounts maintenance form (see the Controller's Office website for these forms). When you receive confirmation that the segment value has been added, then complete the *How to Add a Row* procedure below.

NOTES:

You can only add a row while in the Hyperion Workspace; you cannot add a row while in Excel/Smart View.

If you try to add a row to a form while someone else is adding a row to that form (even from a different Entity/Org), you receive an error message saying the form has been locked by the other user. You must wait for the other person to finish adding rows.

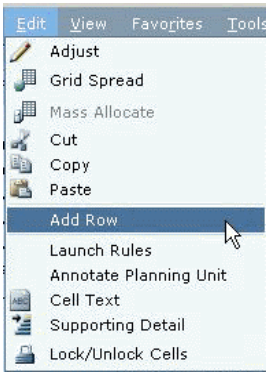
If you need to exit from the "add a row" procedure, make sure you use the Cancel button on the Additional Row Definition screen. If you click the X in the upper left corner to close the window, you lock the form. If that happens (your name appears in the error message others receive), you can unlock the form by choosing **Edit→ Add Row** while in that form and then clicking the Cancel button in the window. That unlocks the form for others.

How to Add Rows to CentBudg

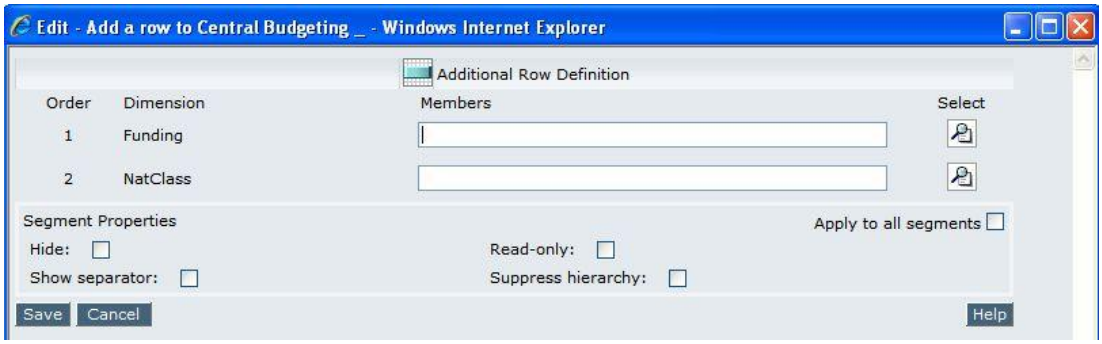
1. In the View pane, select the **Add a row** form.

   Make sure you are in the appropriate Entity and Org.

2. Choose **Add a Row** from the **Edit** menu.



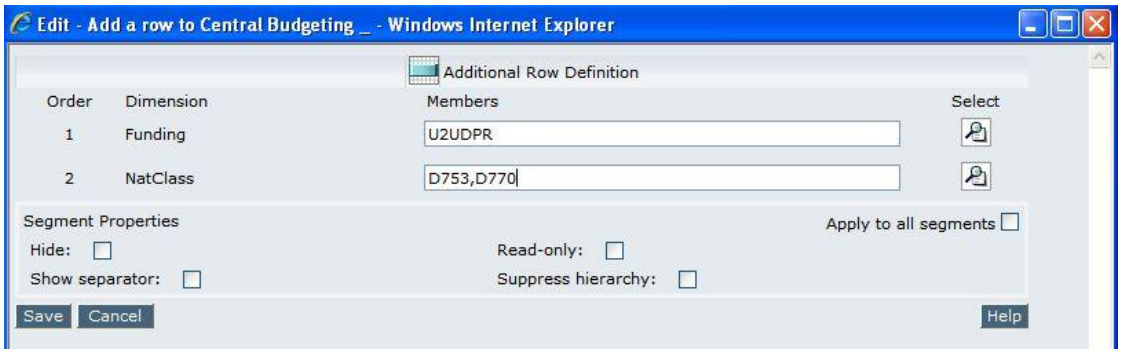
3. In the *General Add new row(s)* window, enter segment values directly in the fields or click the Select icon for a list of values in hierarchical order.



If you enter the values directly, enter just the Level 2 Funding value (such as U2UPDR) and the Level 4 NatClass value (such as D753). Do not use the F: prefix or the N: prefix on this form.

You can enter multiple values in any or all the fields. You must enter a comma between each value.

For example, to add rows for twoNatural Classes (D753 and D770) for Undesignated Operating Funding, you would enter values as shown here:



The more values you enter for each segment, the more rows you create. If you enter one value for Funding and three for NatClass, you add three rows. If you enter three values for Funding and three for NatClass, you'll add nine rows (3x3). Verify that all the values you enter should be added in those combinations.

4. Once you have entered values for Funding and Natural Class, click **Save**.

   The rows now appear on the Add a Row form you are on.

5. Enter and save budget data for the rows you add. If you do not enter and save data on this form, the rows will not appear on the appropriate data forms.

   The rows will remain on the General Add new row(s) form across all Orgs. This means you may see rows here that other people have created but that are not related to your Org. However, you will only see values in the rows for which you have access to the Org.

   If you mistakenly add rows that already exist in the forms, the rows will be populated with the data already stored on the form. For example, if when you add a row it appears with a value of 1000 in the budget column, you know the row is already in your forms.

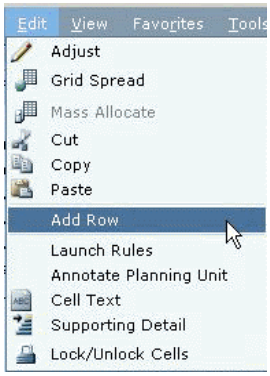
   Rows remain on this form until the Planning office deletes them. You cannot delete them yourself. Deletions will be performed on a regular basis.

How to Add Rows to DeptBudg

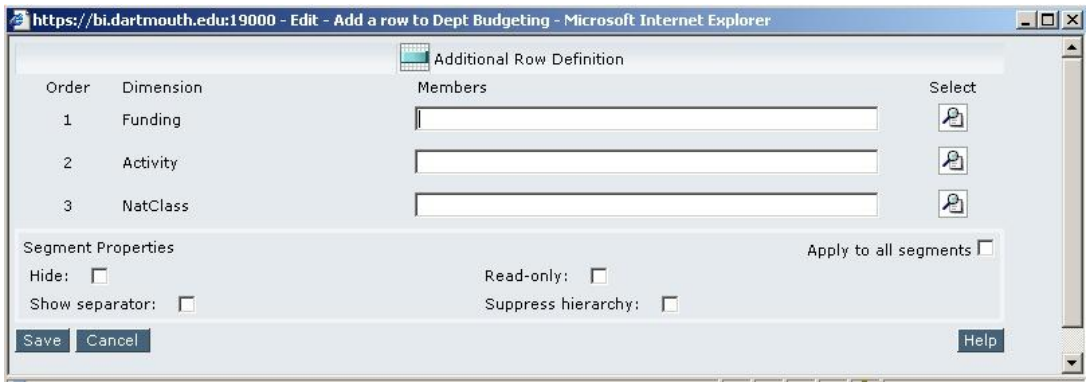
1. In the View pane, select the **Add a row** form.

   Make sure you are in the appropriate Entity and Org.

2. Choose **Add a Row** from the **Edit** menu.



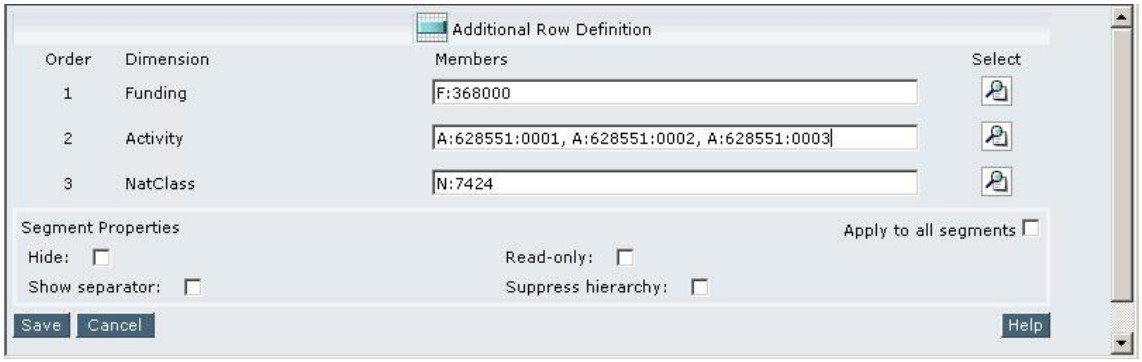
3. In the *General Add new row(s)* window, enter segment values directly in the fields or click the Select icon for a list of values in hierarchical order.



   If you enter the values directly, make sure you enter the appropriate prefix before each value, that is, **N:** before a natural class value, and **F:** before a funding value, and **A:** before an activity value. (The Activity value must also be followed by a colon and a SubActivity value, e.g., A:368000:0000)

   You can enter multiple values in any or all the fields. You must enter a comma between each value.

   For example, to add rows for 3 Subactivities (S:0001 through S:0003) for the Exhibits Activity (A:628551), Subvention Funding (F:368000), and SUPPLIES ARTS Exhibition Installation Natural Class (N:7424), you would enter values as shown here:



The more values you enter for each segment, the more rows you create. If you enter one value for NatClass, one for Funding, and three for Activity, you add three rows. If you enter two values for NatClass, three for Funding, and four for Activity, you'll add 24 rows (2 x 3 x 4). Verify that all the values you enter should be added in those combinations.

4. Once you have entered values for Natural Class, Funding, and Activity, click **Save**.

   The rows now appear on the Add a Row form you are on.

5. Enter and save budget data for the rows you add. If you do not enter and save data on this form, the rows will not appear on the appropriate data forms.

   The rows will remain on the General Add new row(s) form across all Orgs. This means you may see rows here that other people have created but that are not related to your Org. However, you will only see values in the rows for which you have access to the Org.

   If you mistakenly add rows that already exist in the forms, the rows will be populated with the data already stored on the form. For example, if when you add a row it appears with a value of 1000 in the budget column, you know the row is already in your forms.

   Rows remain on this form until the Planning office deletes them. You cannot delete them yourself. Deletions will be performed on a regular basis.

Best Practices

This section describes a number of best practices to follow in order to work most efficiently. These include suggestions on how to end your session, keeping your browser cache free, and viewing data forms.

- When exiting Hyperion Workspace, choose **File→ Log Off** or click the **Log Off** button on the toolbar rather than simply closing the browser window.
- If you do not save or refresh data within two hours of logging in, your connection will time out. Entering data in a form does not count against this time limit unless you save it.
- Each time you open up a view of budget data, the page is cached in memory. As you open a number of different views over time, your browser's cache may fill up. Therefore, it is advisable to clear your web cache on a regular basis so it does not adversely impact your performance. In Internet Explorer, from the **Tools** menu select **Internet Options** and on the **General** tab click **Delete Files** to clear your cache.
- Because of the constraint on screen space, it is recommended that you increase monitor resolution to as high as comfortable. To do this, on the desktop click **Start**, point to **Settings**, click **Control Panel**, and then double-click **Display**. Click the **Settings** tab and drag the Screen Resolution slider to the right. Click **OK**.
- You can also expand your view of individual forms by hiding the View pane (the one on the left side of the screen). To toggle your view between hiding and displaying the View Pane, from the Hyperion Planning menu choose **View→ View Pane.**

Working with Forms in Hyperion Smart View

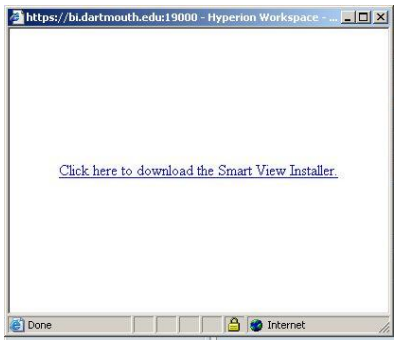
Hyperion Smart View is an application that allows you to open planning forms in Excel. This allows you to take advantage of Excel capabilities when entering data and calculations into existing forms. In this case you need to create and maintain a live connection to the Planning server through Excel.

Instructions for installing Smart View, establishing a connection, and using Smart View to enter data follow.

Smart View Initial Set-Up

When logged in to Hyperion Workspace, within the Planning application, choose **Tools→ Install→ Smart View**

A link will appear in a separate window.

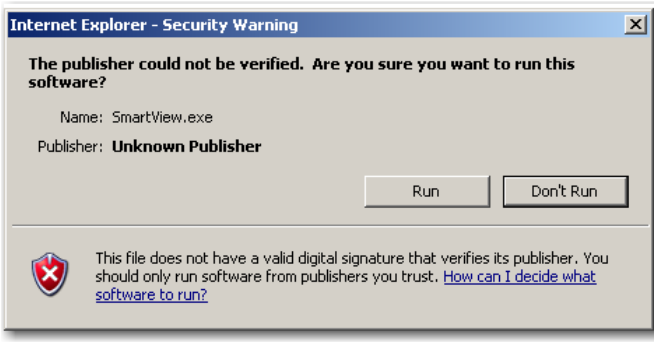


Click the link for download.

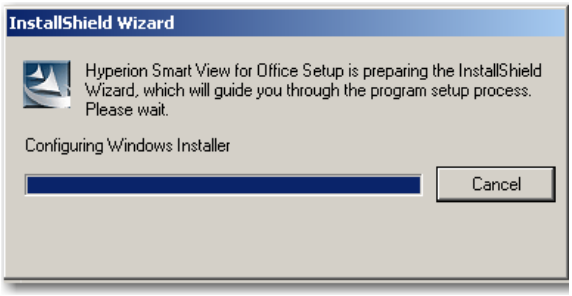
File Download - Security Warning
Do you want to run or save this file?
Name: SmartView.exe
Type: Application
From: bi.dartmouth.edu
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

Click **Run**.

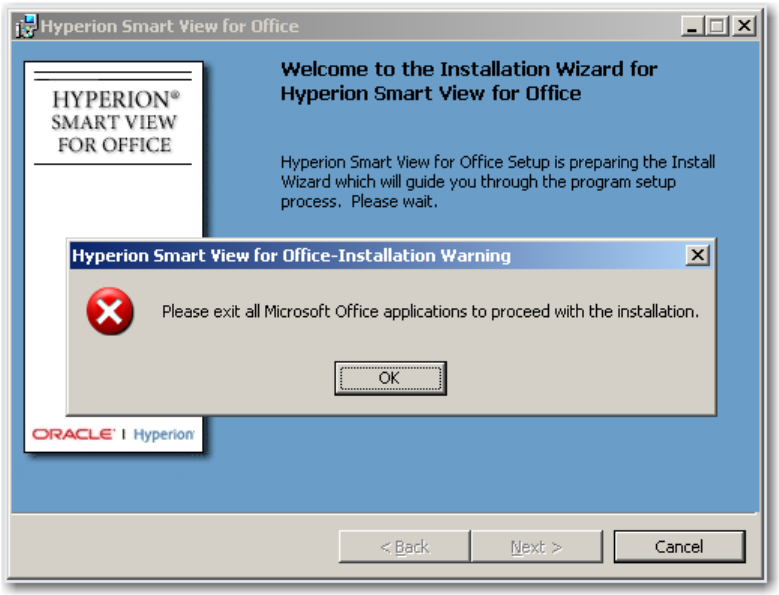
A Security Warning may appear:


Internet Explorer - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: SmartView.exe
Publisher: Unknown Publisher
Run
Don't Run
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust. How can I decide what software to run?

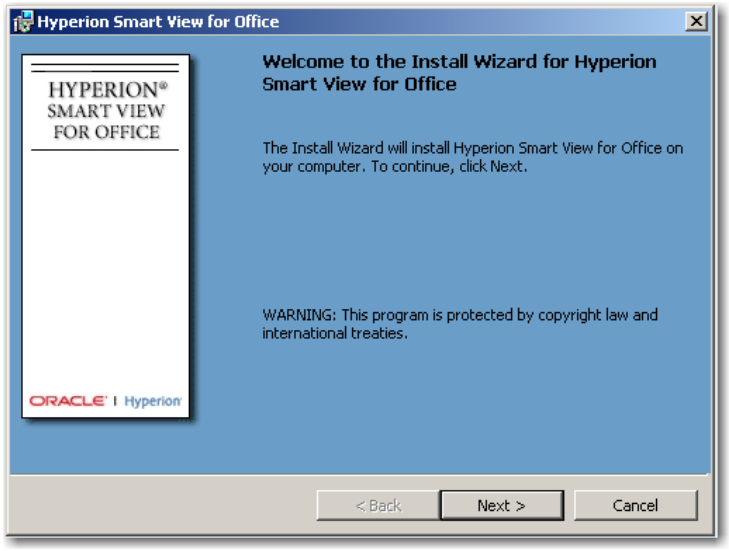
Click **Run**.


InstallShield Wizard
Hyperion Smart View for Office Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
Configuring Windows Installer
Cancel

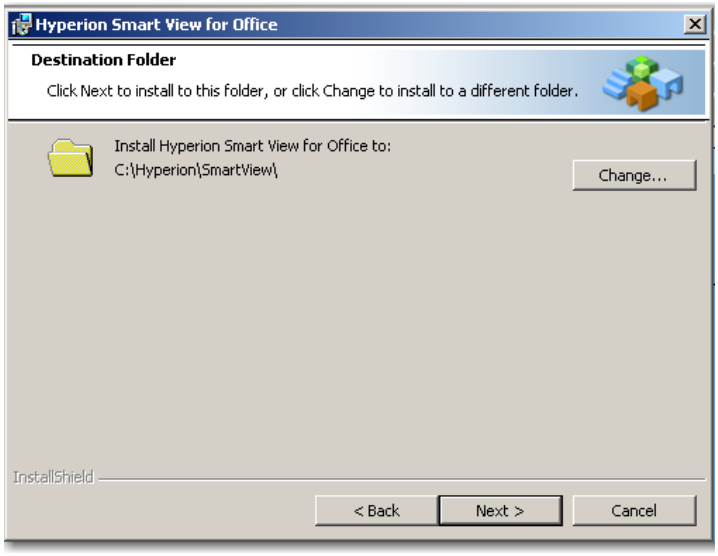
If any Microsoft Office applications are running, the following message appears:


Hyperion Smart View for Office
HYPERION®
SMART VIEW
FOR OFFICE
Welcome to the Installation Wizard for Hyperion Smart View for Office
Hyperion Smart View for Office Setup is preparing the Install Wizard which will guide you through the program setup process. Please wait.
Hyperion Smart View for Office-Installation Warning
Please exit all Microsoft Office applications to proceed with the installation.
OK
ORACLE | Hyperion
< Back
Next >
Cancel

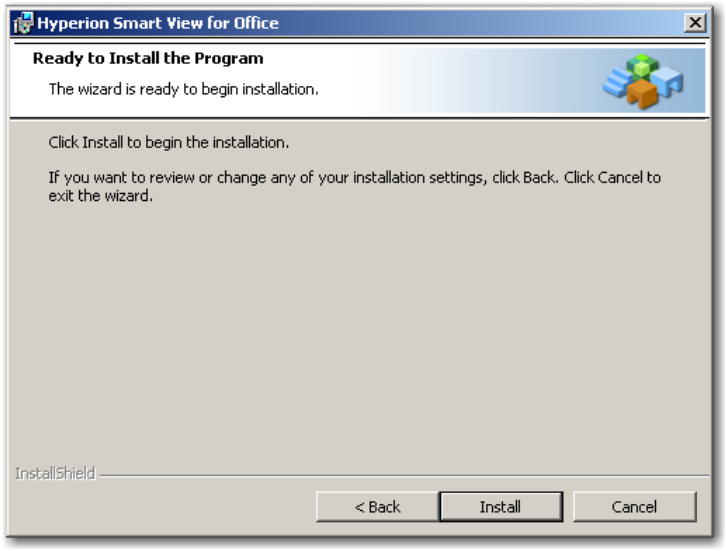
Exit Office applications as instructed, saving your work as you close them down. If the error message persists after applications are closed, you may need to reboot to run the installation.


Hyperion Smart View for Office
HYPERION®
SMART VIEW
FOR OFFICE
ORACLE | Hyperion
Welcome to the Install Wizard for Hyperion Smart View for Office
The Install Wizard will install Hyperion Smart View for Office on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

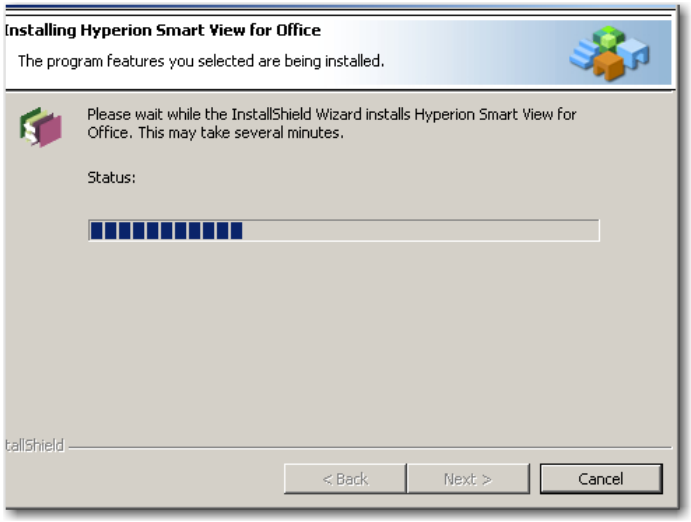
Click **Next**.

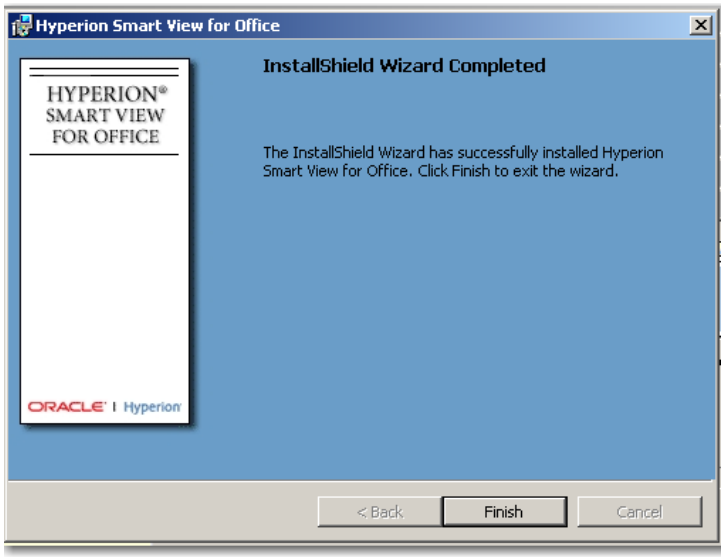

Hyperion Smart View for Office
Destination Folder
Click Next to install to this folder, or click Change to install to a different folder.
Install Hyperion Smart View for Office to:
C:\Hyperion\SmartView\
Change...
InstallShield
< Back
Next >
Cancel

Click **Next** to accept the default location.


Hyperion Smart View for Office
Ready to Install the Program
The wizard is ready to begin installation.
Click Install to begin the installation.
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.
InstallShield
< Back
Install
Cancel

Click **Install**.

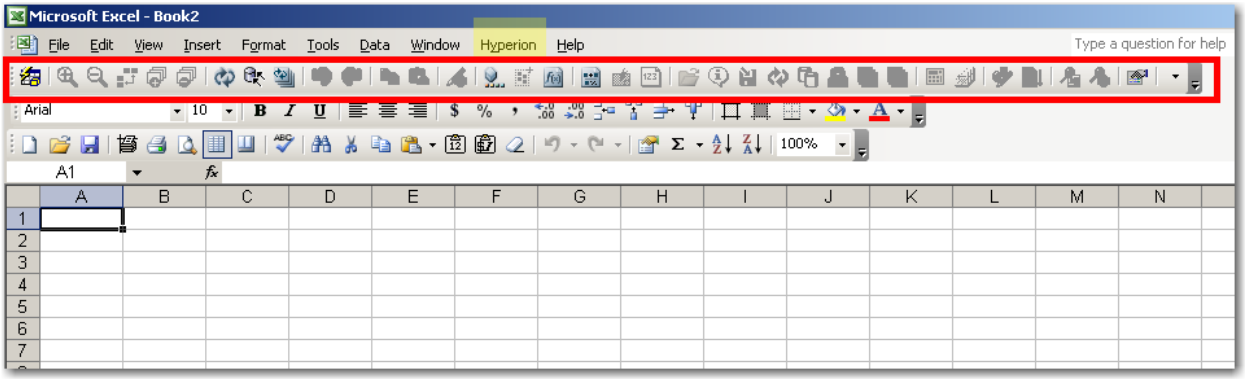

Installing Hyperion Smart View for Office
The program features you selected are being installed.
Please wait while the InstallShield Wizard installs Hyperion Smart View for Office. This may take several minutes.
Status:
< Back
Next >
Cancel



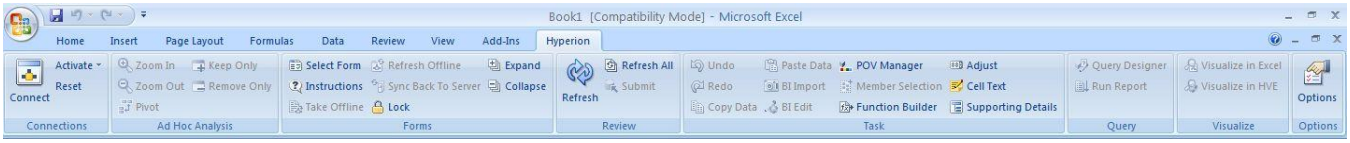
Click **Finish**.

Smart View and Microsoft Office Suite

When you open Excel, a Hyperion Smart View for Office toolbar and a Hyperion menu appear, as shown here:



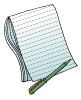
When you open Excel 2007, Hyperion Smart View for Office and Add-ins ribbons appear, as shown here:


Book1 [Compatibility Mode] - Microsoft Excel
Home Insert Page Layout Formulas Data Review View Add-Ins Hyperion
Connect Activate Reset
Zoom In Zoom Out Pivot Keep Only Remove Only
Select Form Instructions Take Offline Refresh Offline Sync Back To Server Lock Expand Collapse
Refresh Refresh All Submit
Undo Redo Copy Data Paste Data BI Import BI Edit POV Manager Member Selection Function Builder Adjust Cell Text Supporting Details
Query Designer Run Report
Visualize in Excel Visualize in HVE
Options
Connections Ad Hoc Analysis Forms Review Task Query Visualize Options

The commands used in the instructions in this manual are available in Excel 2007 either directly on the Hyperion ribbon or from the Hyperion menu on the Add-Ins ribbon.

Installing Smart View will affect the functionality of Excel, Word and PowerPoint, since it is installed as an available add-in application throughout Microsoft Office Suite. A "Hyperion" menu will be available in Excel, Word, and PowerPoint. If you are using Outlook and Word is set as your e-mail editor, the Hyperion menu will appear there too.

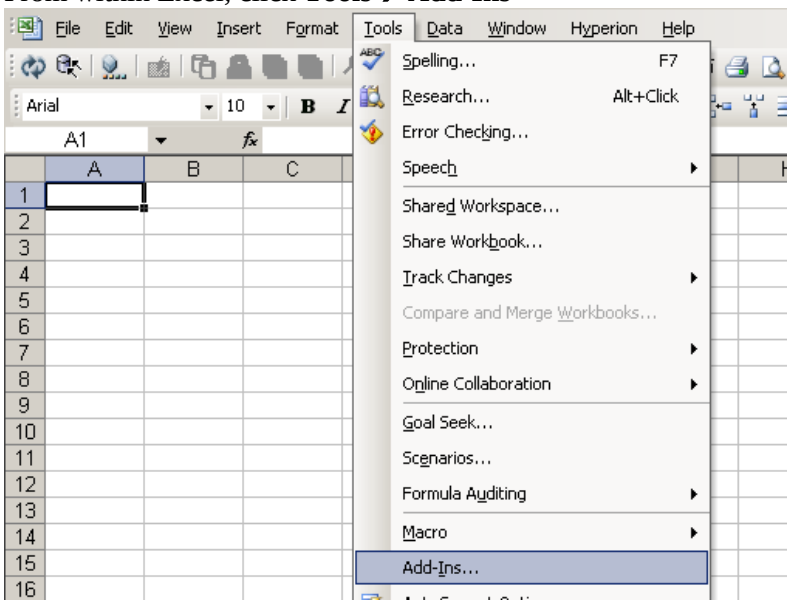
For example, in Word and PowerPoint, reporting or presentation images can be imported from Hyperion.



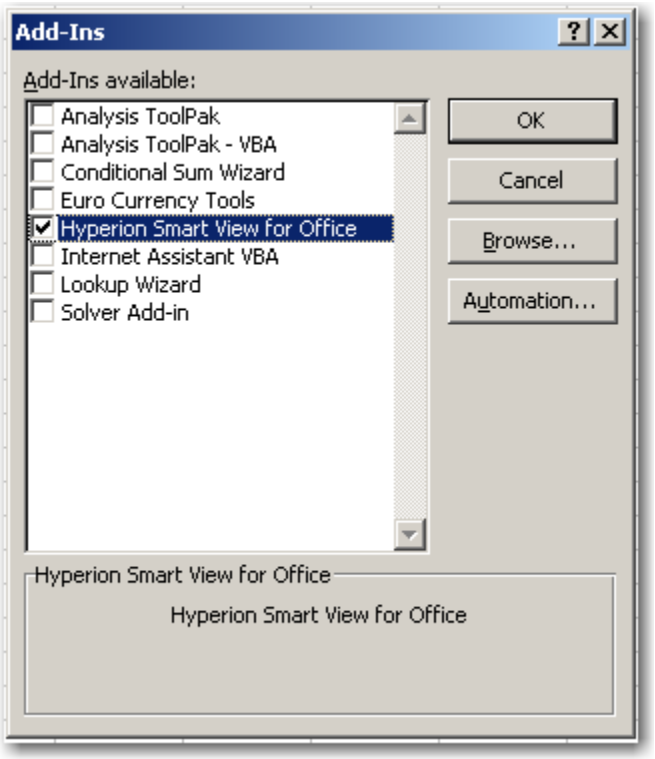
NOTE: This add-in can be disabled in the event that it interferes with other Office functionality. For example, a spreadsheet with protection enabled may not be able to be saved with Smart View enabled.

To enable or disable Smart View in Excel pre-2007 versions:

1. From within Excel, click **Tools→ Add-Ins**



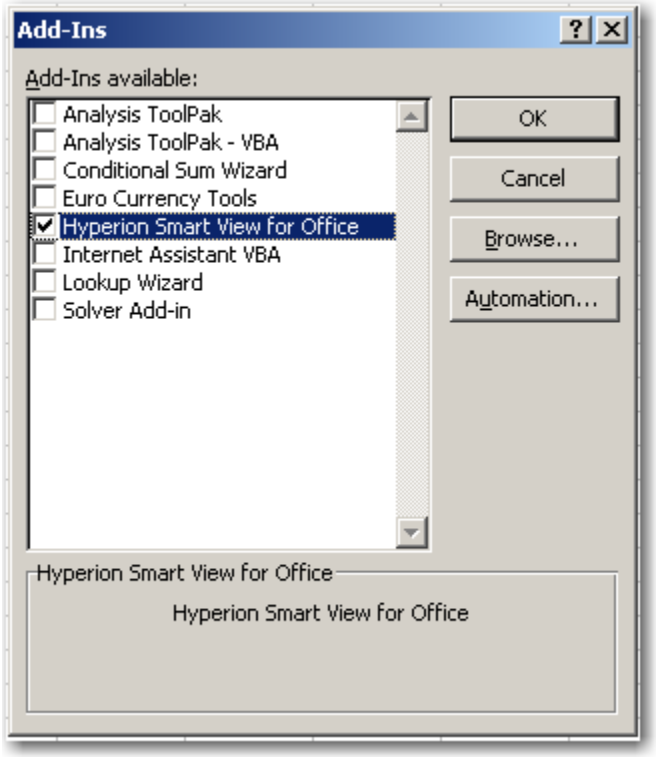
2. Check or uncheck the "Hyperion Smart View for Office" item (to enable or disable Smart View) and click OK.



To disable Smart View in Word or PowerPoint, click **Hyperion→ About**…, and in the About Hyperion Smart View dialog box, uncheck the Enable Add-in item, and click **OK**. The Hyperion menu will remain in the application, but will only contain the About… item. (The only way to remove the Hyperion menu from Word and PowerPoint is to use the Windows Control Panel to remove the Hyperion Smart View for Office program, which will also remove it from Excel.)

To load or unload Smart View in Excel 2007:

1. Click the Microsoft Office Button and then click **Excel Options**.
2. Click **Add-Ins**.
3. In the Manage box, select **Excel Add-ins** and then click Go.
4. In the Add-Ins available box, clear the check box for Hyperion Smart View for Office and then click OK.



If the Hyperion Smart View for Office add-in does not appear here (and you have installed it), it is likely that it has been disabled. See the procedure below to enable Smart View in Excel 2007.

To unload Smart View in Word 2007 or PowerPoint 2007, follow the instructions above, but in step 1, substitute either **Word Options** or **PowerPoint Options** for **Excel Options**, and in step 3, substitute **COM Add-Ins** in place of **Excel Add-ins**.

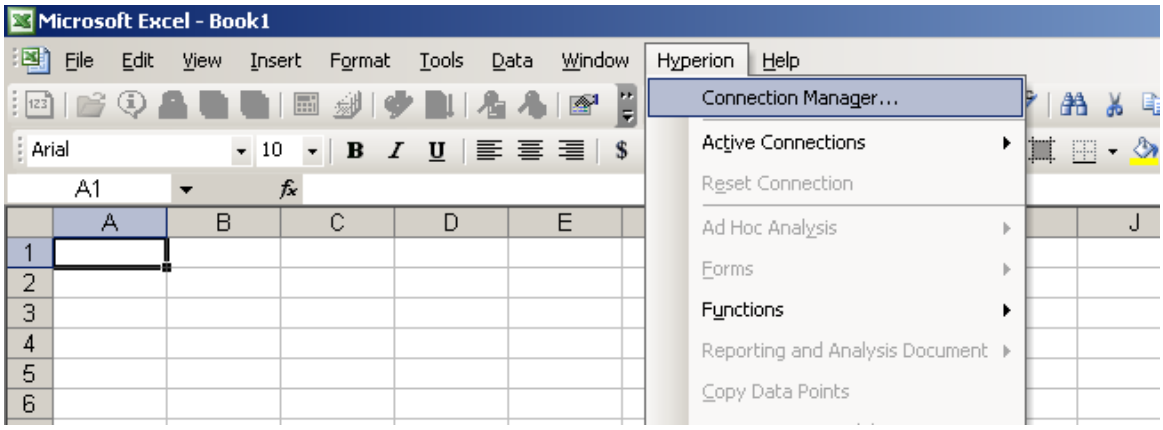
To enable Smart View in Excel 2007:

1. Click the Microsoft Office Button and then click **Excel Options**.
2. Click **Add-Ins**.
3. In the Manage box, select **Disabled Items** and then click Go.
4. Select the Smart View add-in and click **Enable**.

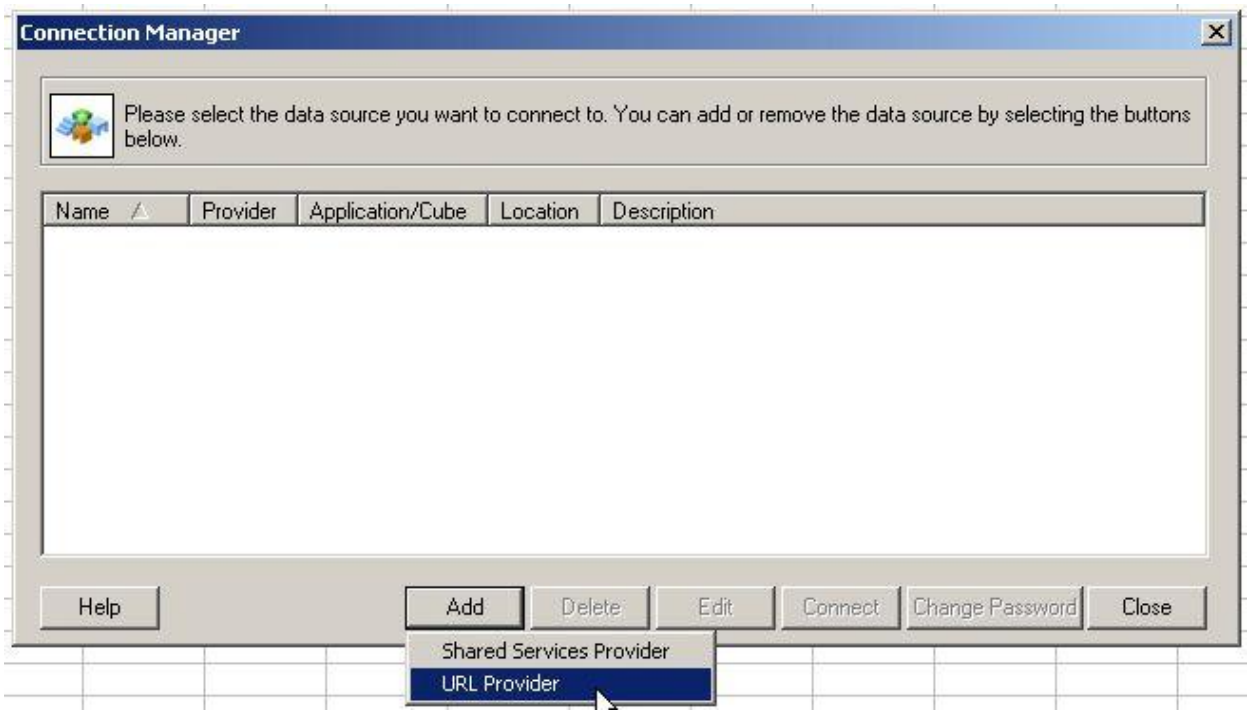
Establishing a Connection

In order to access the Smart View forms, you must first establish a connection to the Planning server.

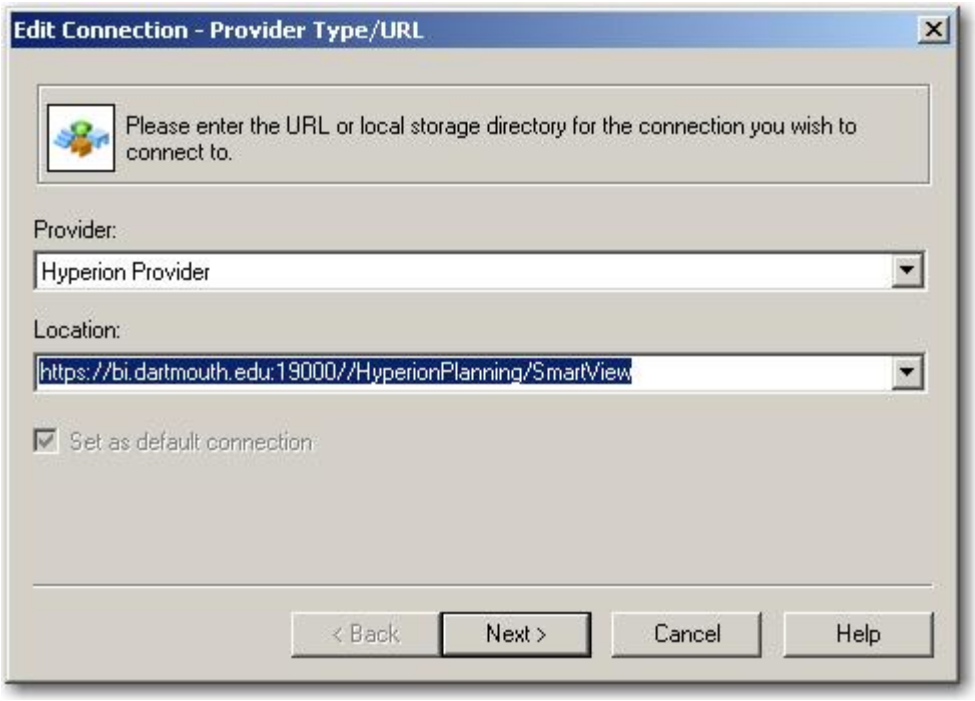
1. To establish a connection to the Hyperion Planning data, select **Hyperion→ Connection Manager…**:



2. In the Connection Manager dialog, click **Add** and select **URL Provider**.

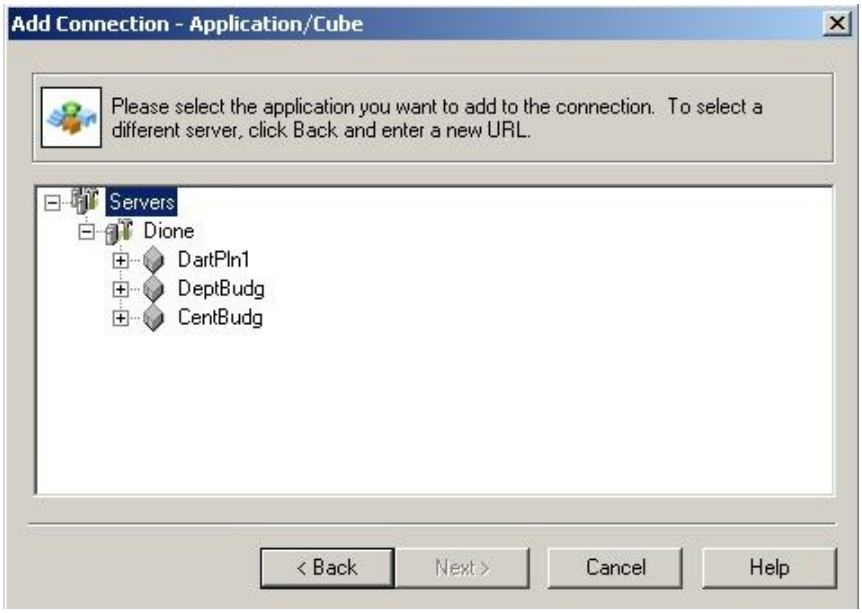


3. Enter the location of the Smart View connection in the Location field and click **Next**.



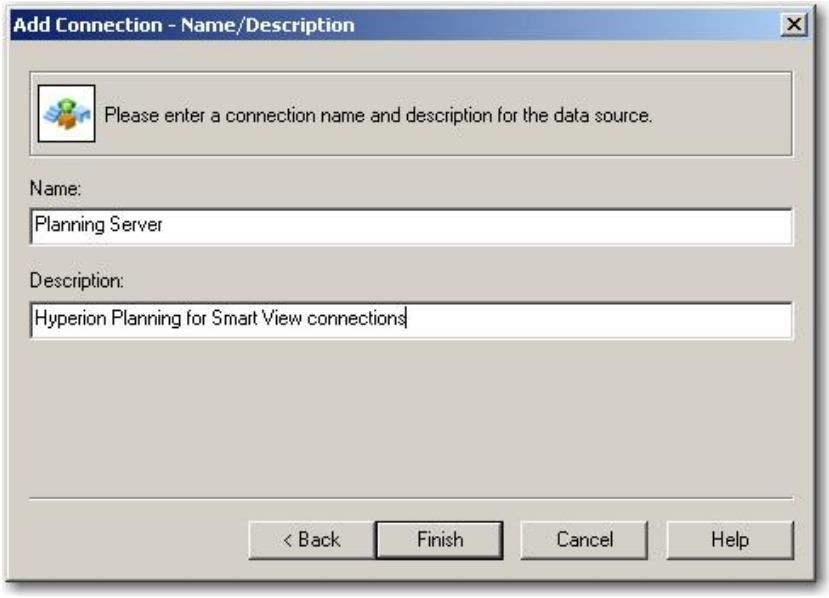
Make sure you enter the location exactly as it appears in this illustration
https://bi.dartmouth.edu:19000//HyperionPlanning/SmartView
(The address is case sensitive and there are two sets of double slashes.)

4. Select the server location from the choices given and click **Next**.



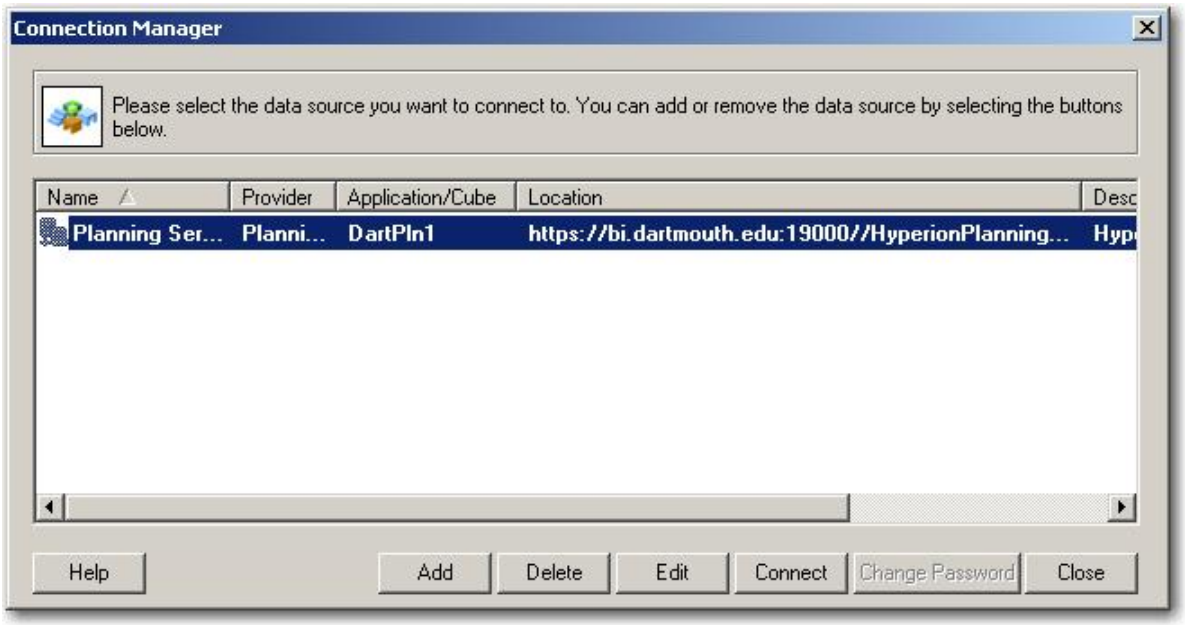
You want a connection to DeptBudg and another connection to CentBudg.

5. Enter a name and description for the connection and click **Finish**.



This defines the connection, but is not yet active/live.

6. To make the connection active, select **Hyperion→ Connection Manager.**



7. Highlight the desired connection and click **Connect**.

8. Log in using your full DND name and password and click **Connect**.

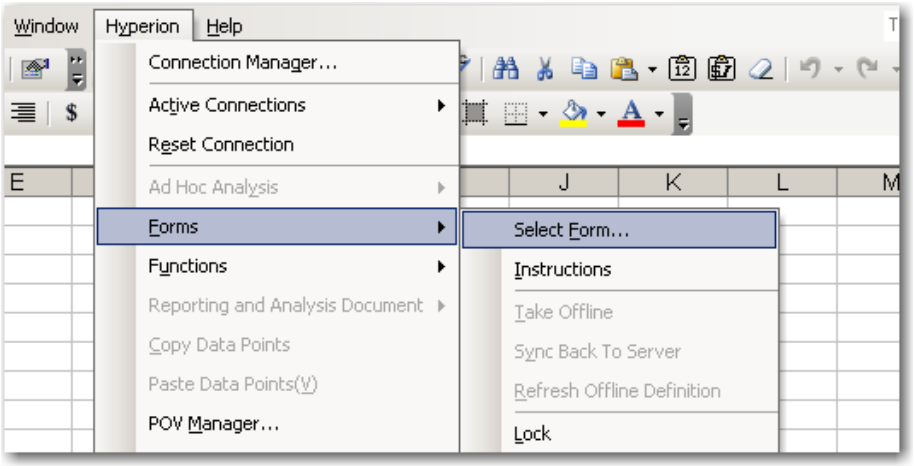
Close the Connection Manager dialog.

9. Check that you have an active connection by choosing **Hyperion→ Active Connections→**

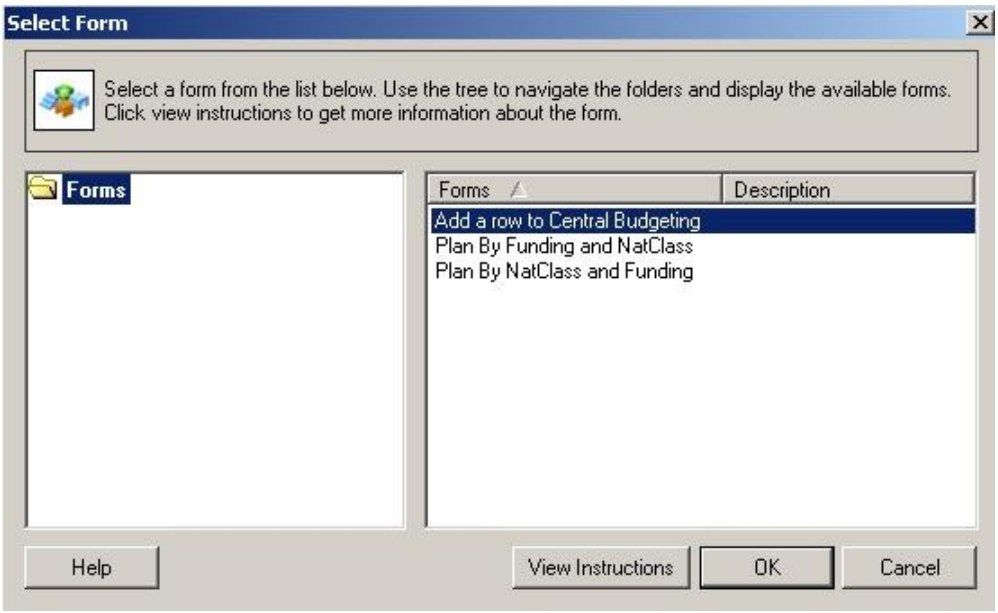
NOTE: There must be a checkmark next to the name of the connection for it to be active.

Selecting a Form

To select a form to work on, choose **Hyperion→ Forms→ Select Form**:



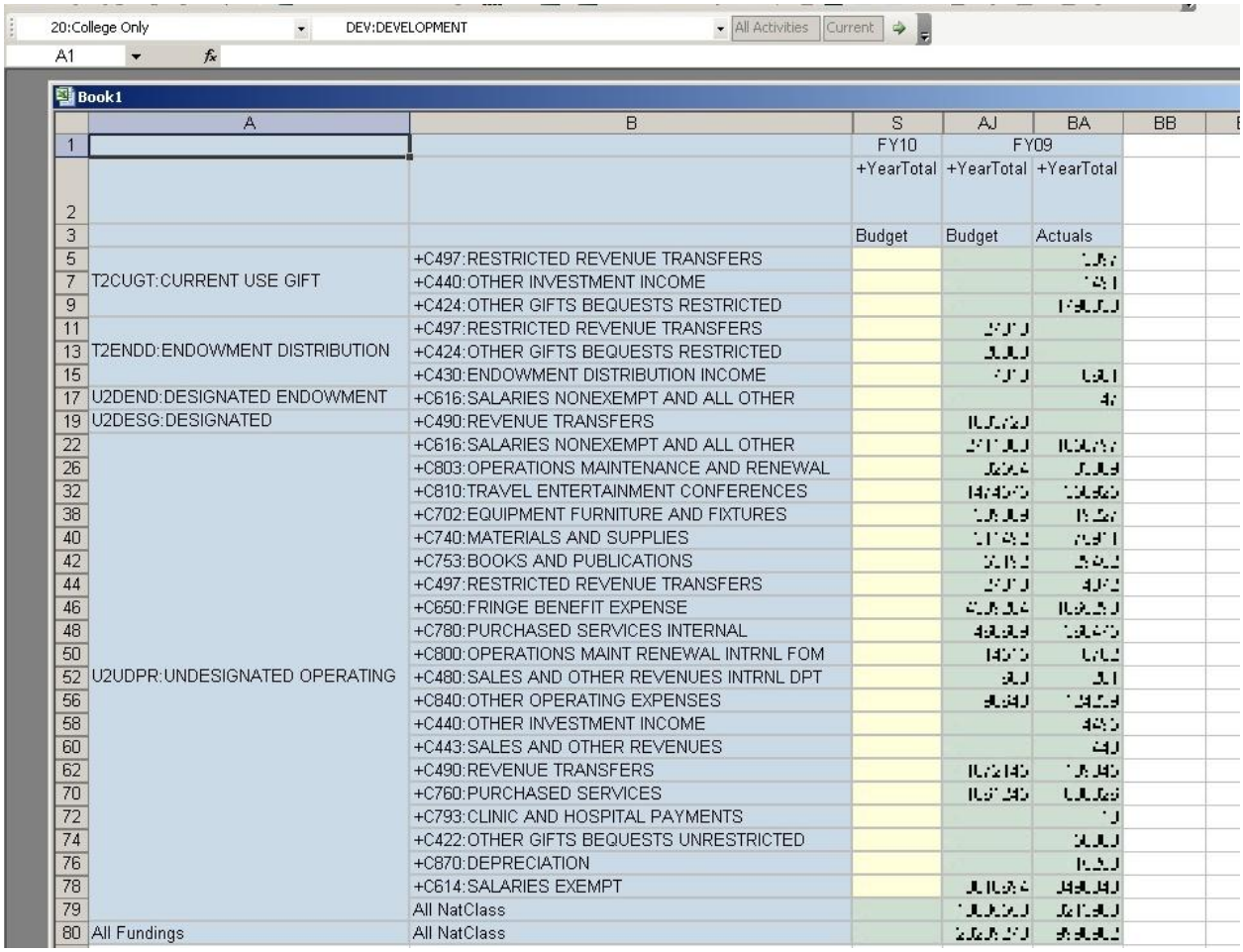
A selection box appears with the same folder structure as inside Workspace:


Select Form
Select a form from the list below. Use the tree to navigate the folders and display the available forms.
Click view instructions to get more information about the form.
Forms
Forms
Description
Add a row to Central Budgeting
Plan By Funding and NatClass
Plan By NatClass and Funding
Help
View Instructions
OK
Cancel

You use the same forms for web input as when using Smart View. Note: Do not use the Add a Row form in Smart View. You can only add a row from the web form.

The first time you open up a form you may get the error message shown below. When the Entity and Org values appear, make sure the Entity value is set to the correct entity for your org. This will resolve the problem.

Choosing the CentBudg form shown in the *Forms* section, results in the following form in Excel:



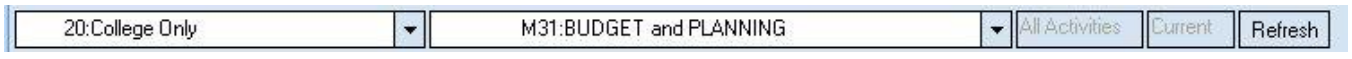
	A	B	S	AJ	BA	BB
1			FY10	FY09		
2			+YearTotal	+YearTotal	+YearTotal	
3			Budget	Budget	Actuals	
5		+C497:RESTRICTED REVENUE TRANSFERS				
7	T2CUGT:CURRENT USE GIFT	+C440:OTHER INVESTMENT INCOME				
9		+C424:OTHER GIFTS BEQUESTS RESTRICTED				
11		+C497:RESTRICTED REVENUE TRANSFERS				
13	T2ENDD:ENDOWMENT DISTRIBUTION	+C424:OTHER GIFTS BEQUESTS RESTRICTED				
15		+C430:ENDOWMENT DISTRIBUTION INCOME				
17	U2DEND:DESIGNATED ENDOWMENT	+C616:SALARIES NONEXEMPT AND ALL OTHER				
19	U2DESG:DESIGNATED	+C490:REVENUE TRANSFERS				
22		+C616:SALARIES NONEXEMPT AND ALL OTHER				
26		+C803:OPERATIONS MAINTENANCE AND RENEWAL				
32		+C810:TRAVEL ENTERTAINMENT CONFERENCES				
38		+C702:EQUIPMENT FURNITURE AND FIXTURES				
40		+C740:MATERIALS AND SUPPLIES				
42		+C753:BOOKS AND PUBLICATIONS				
44		+C497:RESTRICTED REVENUE TRANSFERS				
46		+C650:FRINGE BENEFIT EXPENSE				
48		+C780:PURCHASED SERVICES INTERNAL				
50		+C800:OPERATIONS MAINT RENEWAL INTRNL FOM				
52	U2UDPR:UNDESIGNATED OPERATING	+C480:SALES AND OTHER REVENUES INTRNL DPT				
56		+C840:OTHER OPERATING EXPENSES				
58		+C440:OTHER INVESTMENT INCOME				
60		+C443:SALES AND OTHER REVENUES				
62		+C490:REVENUE TRANSFERS				
70		+C760:PURCHASED SERVICES				
72		+C793:CLINIC AND HOSPITAL PAYMENTS				
74		+C422:OTHER GIFTS BEQUESTS UNRESTRICTED				
76		+C870:DEPRECIATION				
78		+C614:SALARIES EXEMPT				
79		All NatClass				
80	All Fundings	All NatClass				

Viewing a Different Entity or Org

To view different entities or orgs in your current form, choose them from the pull-down lists above the data entry sheet.

You must click the right arrow next to the lists in order to view that data, just as you had to click the **Go** button when using the online forms.

In Excel 2007, the Entity/Org lists appear like this:



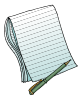
You must click the **Refresh** button after you select a different entity or org in order to view the appropriate form.

In the Hyperion workspace, you could open multiple tabs to view different forms within a session.

In Smart View, to view other forms within a session you must first open a blank worksheet. From that worksheet, establish a live connection and then select another form to open. If you select a new form when viewing one that is already open, the new form will open in place of the current worksheet.

Entering Data and Navigating within Smart View Forms

Some formulas are built into the Smart View forms, e.g., quarterly and annual totals. Others can be added using Excel functionality. These formulas are only retained when you work on the form. That is, the values calculated from the formulas are sent to the server, but the formulas are not.



NOTE Do not add or delete rows or columns in the Smart View forms as this corrupts their structure and formulas. If you need to add a row to budget against a chart string not on the form, you must add the row from the Hyperion Workspace. Once it is established there, it will then appear in the corresponding Smart View form.

Saving Data and Running Business Rules

When you want to save your data while working in Smart View, click the Submit Data button (or choose **Hyperion→ Submit Data**). This saves the data on the server. If you make a mistake as you are working you can click Refresh to display the form again with the last saved values from the server.

Saving data does not automatically perform calculations and update the remaining totals on your forms.

In CentBudg there is no business rule. Totals are updated when the entire cube is aggregated which happens automatically at 8 p.m. each night. You must be logged out of the system during the aggregation which last about 30 minutes.

In DeptBudg, in order to perform the calculations and see what affect the new saved data has upon the totals on your forms, you must run the business rule and then refresh your form. By default, the business rule runs each night at 9 p.m. across all Orgs so if you do not run the business rule, your totals will be correct at the start of the next day. You must be logged out of the DeptBudg cube during the aggregation and the construction of the reporting cube which completes by 10 p.m.

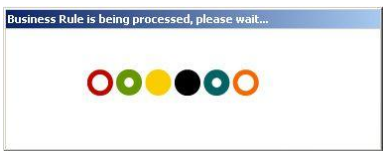
To run Business Rules:

1. With cursor over the fields on the left side of the form, right-click and choose **Hyperion Planning→ Run business rule for this Org**.

   The Business Rules window appears with the current Entity and Org values filled in.

2. Click **Launch**.

   The business rules take a few moments to run. A progress window appears until the process is complete.

3. Click **OK**.

4. Choose **Hyperion→ Refresh** or **Hyperion→ Refresh All** to update your view of the form(s) and see the updated remaining totals. Unless you refresh the form, you will not see the updated totals.

Adding Cell Text

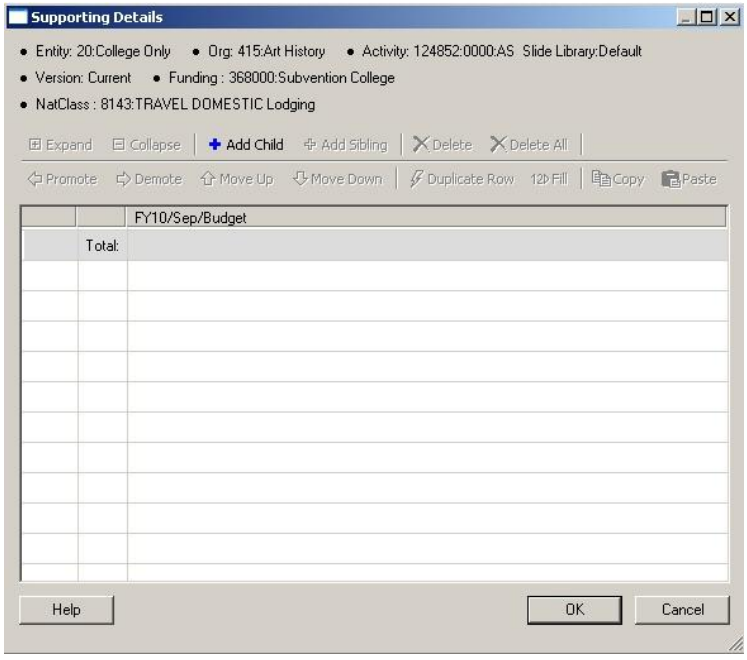
When you click the Cell Text icon or choose **Hyperion→ Cell Text**, the Cell Text window appears. NOTE: You may need to resize this window to see the text field. Unlike in the web forms, your data is not automatically saved to the server when entered here. Only when you choose **Submit Data** will the data be saved. A cell with text attached is highlighted as shown here (a blue triangle does not appear in the cell as it does in Hyperion Planning):

Adding Supporting Detail

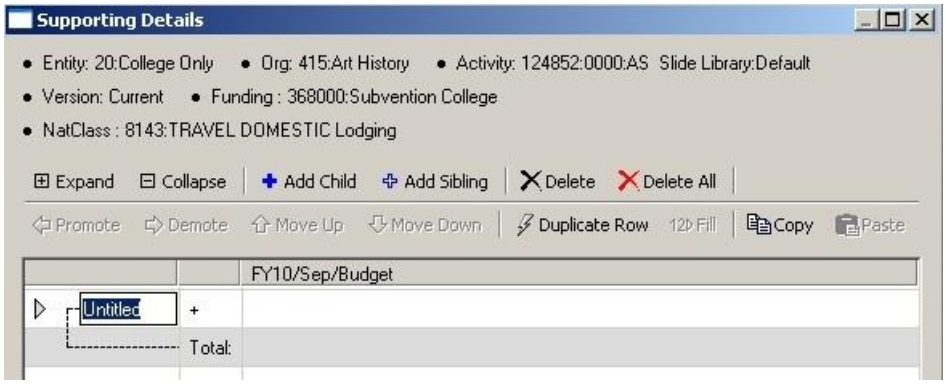
When you add supporting detail using Smart View, a different sequence of screens appears from when you work in the Hyperion Workspace.

1. Select a cell (or a range of monthly cells in a row if working online) and click or choose **Hyperion→ Supporting Detail**) to open the Supporting Detail window.

   In this example, September was selected.

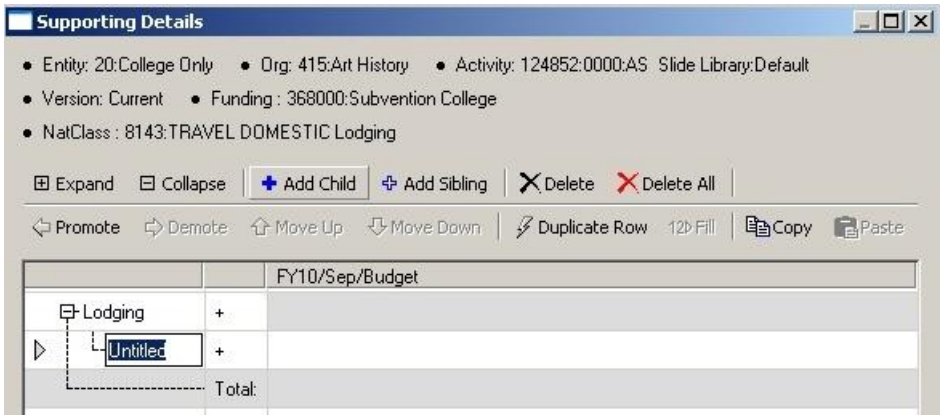


2. Click **Add Child**.

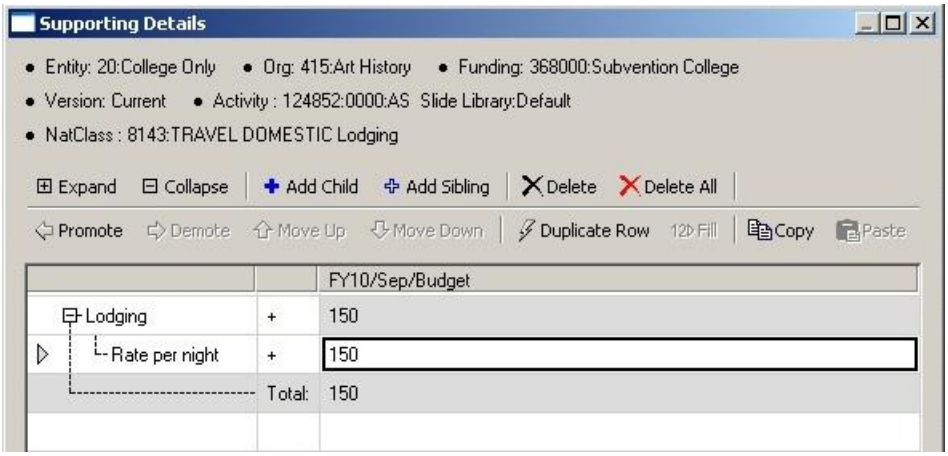


3. Enter a name for this field.
   For this example, enter *Lodging*.

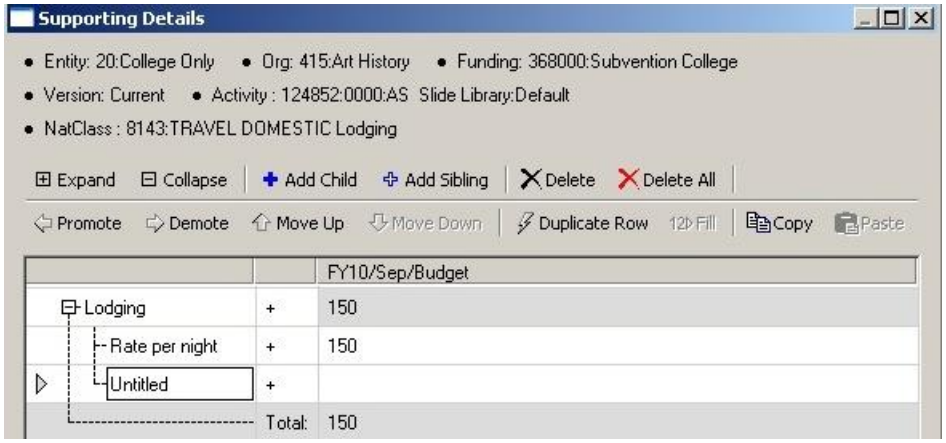
4. Click **Add Child** and enter a name for this factor.
   For this example, enter *Rate per night*.



5. Click in the Budget column and enter a rate.
   For this example, enter *150*.

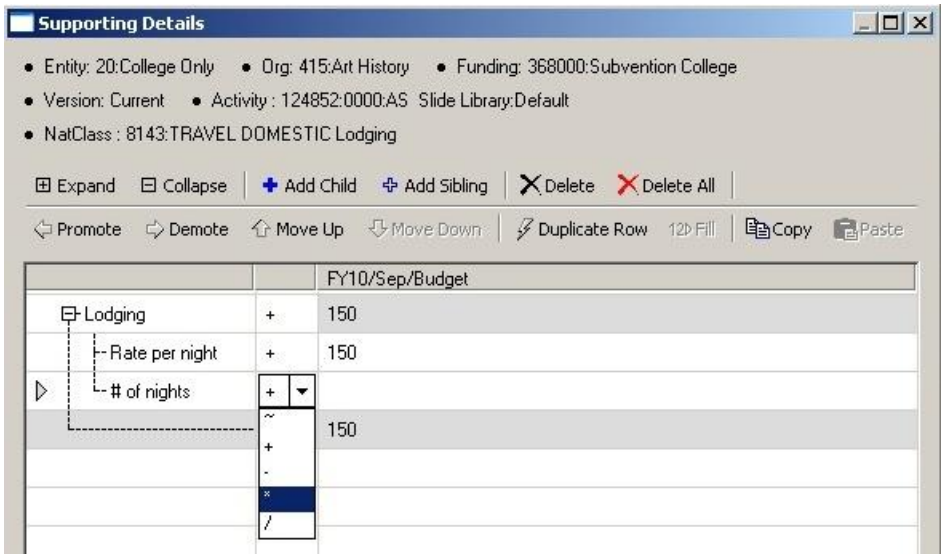


6. Click **Add Sibling** to choose another factor.
   Another text field appears below the first.

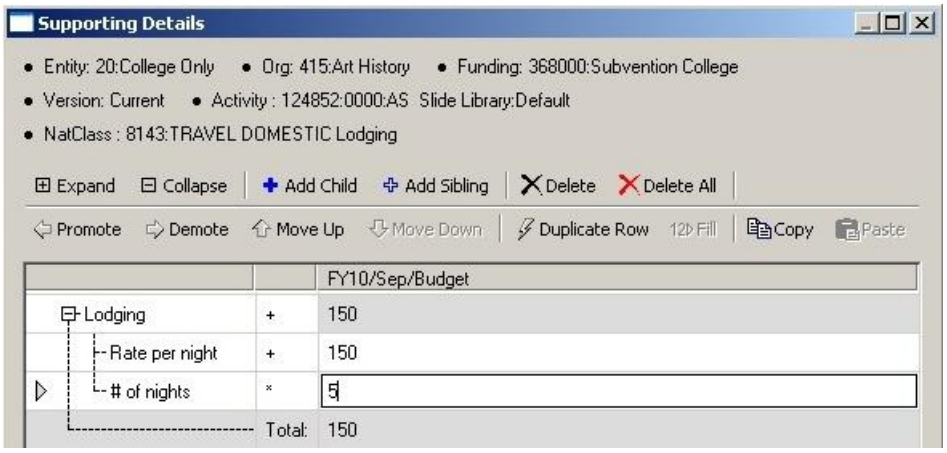


7. Enter a description of this factor.
   For this example, enter *# of nights*.

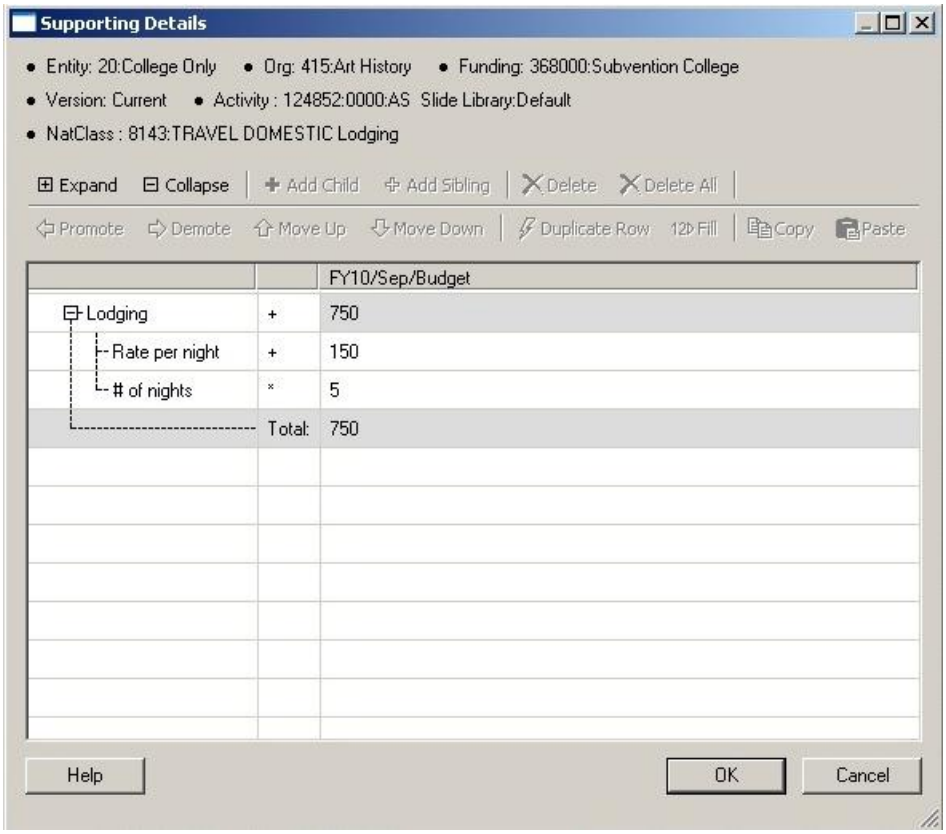
8. Double-click on the math operator to change it to one that reflects how the factors are related.
   In this example, choose *.



9. Click in the Budget column and enter a value.
   In this example, enter *5*.



10. Click in the Total row to complete the calculation.



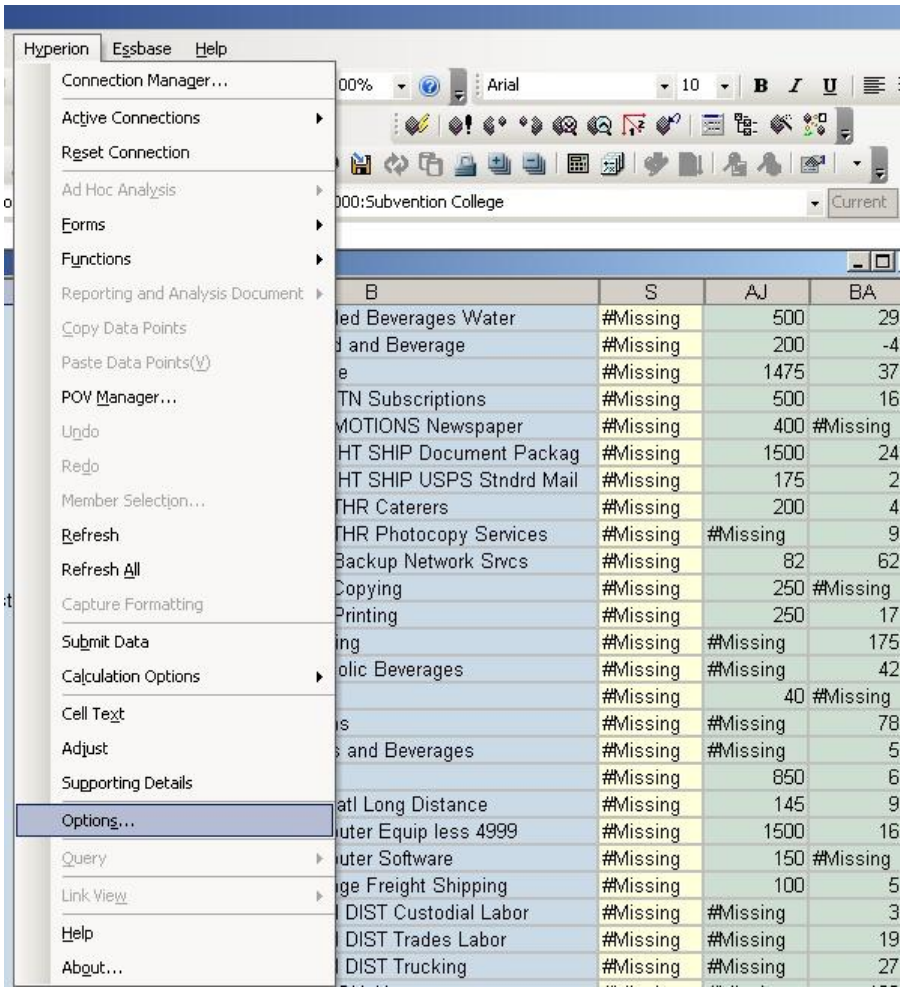
11. Click **OK**.

    The totals from the Supporting Detail page appear on the form, along with new values for the quarterly and yearly totals.

Option Settings

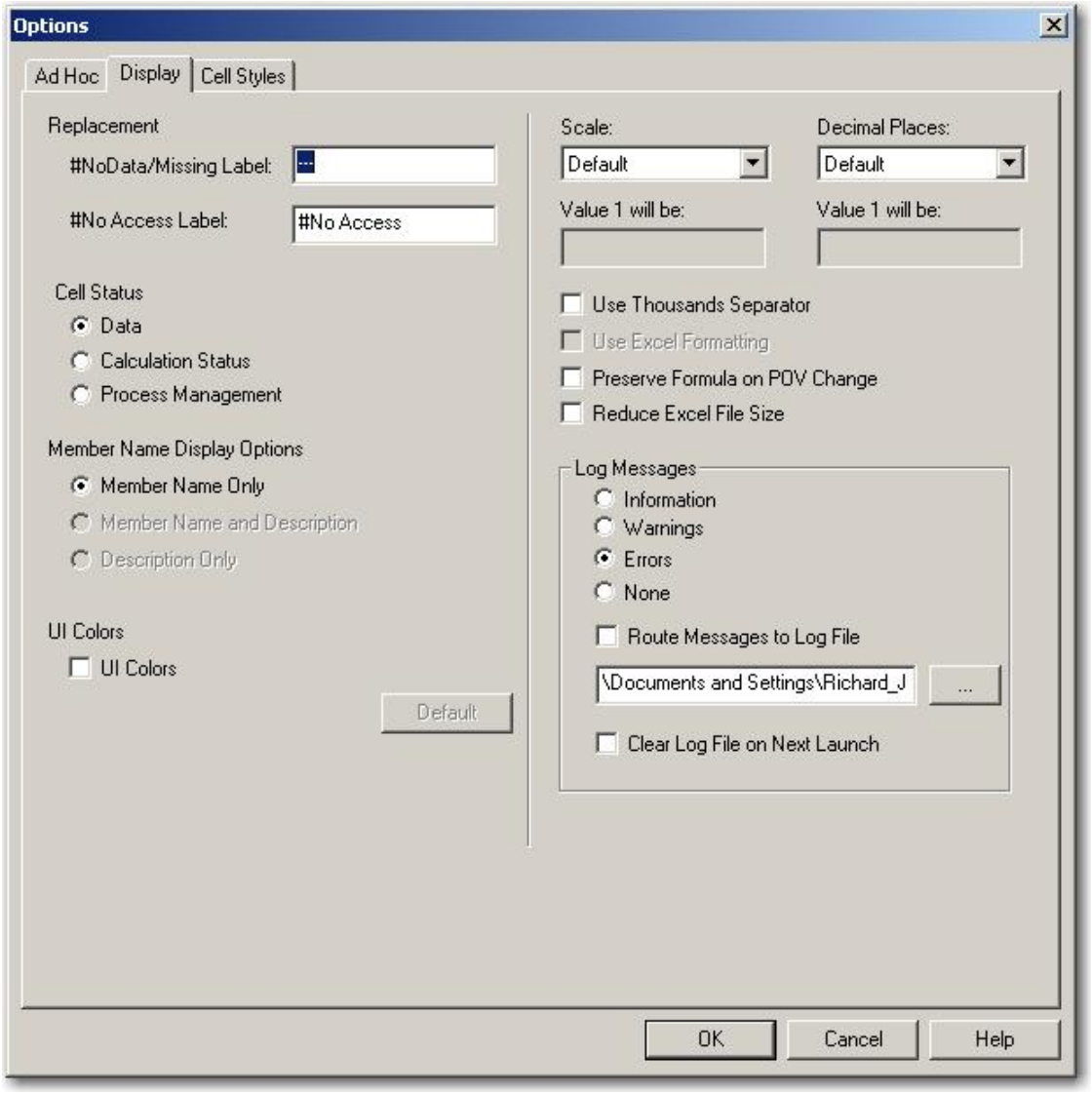
By default, fields which are missing values are displayed with #Missing in the field. You can change that so other characters, such as ---, are displayed there instead.

1. Choose **Hyperion→ Options**.



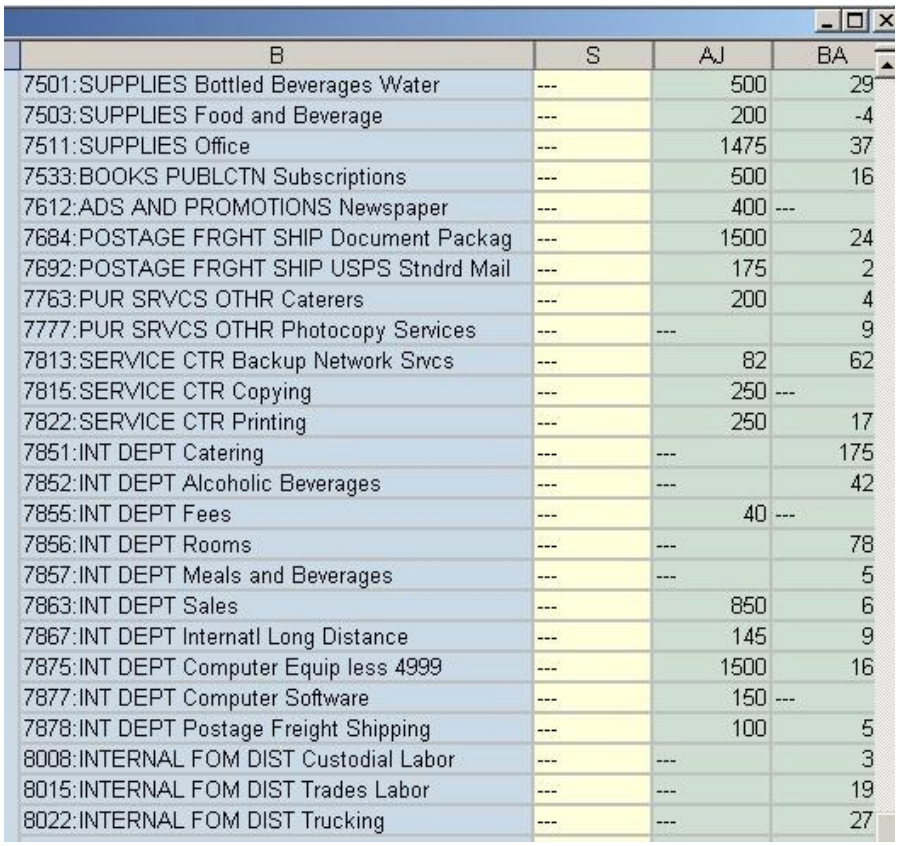
   This opens the Options window.

2. On the Display tab, enter the characters you want to display in fields without data. For example, enter --- in the field labeled #NoData/Missing Label.


Options
Ad Hoc
Display
Cell Styles
Replacement
#NoData/Missing Label:
#No Access Label:
#No Access
Cell Status
Data
Calculation Status
Process Management
Member Name Display Options
Member Name Only
Member Name and Description
Description Only
UI Colors
UI Colors
Default
Scale:
Default
Decimal Places:
Default
Value 1 will be:
Value 1 will be:
Use Thousands Separator
Use Excel Formatting
Preserve Formula on POV Change
Reduce Excel File Size
Log Messages
Information
Warnings
Errors
None
Route Messages to Log File
\Documents and Settings\Richard_J
...
Clear Log File on Next Launch
OK
Cancel
Help

3. Click **OK**.

4. Choose **Refresh** to see how the fields without data now appear.



B	S	AJ	BA
7501:SUPPLIES Bottled Beverages Water	---	500	29
7503:SUPPLIES Food and Beverage	---	200	-4
7511:SUPPLIES Office	---	1475	37
7533:BOOKS PUBLCTN Subscriptions	---	500	16
7612:ADS AND PROMOTIONS Newspaper	---	400	---
7684:POSTAGE FRGHT SHIP Document Packag	---	1500	24
7692:POSTAGE FRGHT SHIP USPS Stndrd Mail	---	175	2
7763:PUR SRVCS OTHR Caterers	---	200	4
7777:PUR SRVCS OTHR Photocopy Services	---	---	9
7813:SERVICE CTR Backup Network Srvcs	---	82	62
7815:SERVICE CTR Copying	---	250	---
7822:SERVICE CTR Printing	---	250	17
7851:INT DEPT Catering	---	---	175
7852:INT DEPT Alcoholic Beverages	---	---	42
7855:INT DEPT Fees	---	40	---
7856:INT DEPT Rooms	---	---	78
7857:INT DEPT Meals and Beverages	---	---	5
7863:INT DEPT Sales	---	850	6
7867:INT DEPT Internatl Long Distance	---	145	9
7875:INT DEPT Computer Equip less 4999	---	1500	16
7877:INT DEPT Computer Software	---	150	---
7878:INT DEPT Postage Freight Shipping	---	100	5
8008:INTERNAL FOM DIST Custodial Labor	---	---	3
8015:INTERNAL FOM DIST Trades Labor	---	---	19
8022:INTERNAL FOM DIST Trucking	---	---	27

Delegating Responsibility to Others

You may decide that you want to delegate the completion of a department budget to someone who does not have access to Hyperion Planning. To do that, you can export the form from Smart View, send it to the person who will complete the budget and then copy that data back into Smart View to submit. The following procedure steps you through the process.

1. In Smart View, connect to the appropriate datacube, open the form you want to pass along, and save the form as an XLS file.

   The Entity/Org values that appear at the top of the form are not saved in an XLS file you send to someone without the Smart View add-in. Name the file so it is clear to which Entity/Org the form corresponds.

2. Send the file to the person you want to complete it.

   The form is read-only (except for the current year budget column) and cannot be re-ordered or re-arranged. You can add formulae to the form (to help the person working on it) if you enter them outside the read-only area.

3. When the completed file is returned to you, first open the original form in Smart View.

4. Once the form is open, then open the completed file you've received.

   Important: Do not work on the completed file while connected (i.e., make changes to the data in the file or double-click on a cell) or all the data will be refreshed and disappear.

5. Copy and paste the data from the completed file into the Smart View form.

6. Submit the data and run the business rule.